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Storied learning from the personal and professional lives of leaders: narrative analyses of rhythm over balance, and adult development and transition

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Storied Learning from the Personal and Professional Lives of Leaders:

Narrative Analyses of Rhythm over Balance, and Adult Development and Transition

by

Pamela Jones Edwards

A dissertation submitted to the graduate faculty

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For the Major Program

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ABSTRACT

This research study is about using the power of stories, specifically life history and narrative research approaches, to understand how three high level organizational leaders experience their own human development over time. Readers who will likely find this research study of value will be those studying life history and narrative approaches to understanding the meaning of lives, adult education scholars and practitioners interested in using narrative as a method of adult development, and readers interested in issues of leadership inside corporate, entrepreneurial, and educational settings. The entire study provides a rich analysis of narrative methodology and processes in the lives of leaders.

Life history and narrative methods are used as a vehicle to understand the meaning of the leaders' lives. In doing so, a life history of each of the three leaders was collected and is retold in Part I, Life Stories of Leaders. The life story section of this research study is introduced with a discussion around the dynamics of representation, voice, subjectivity, researcher-researched relationships, and ethics. Common themes in the lives of this three leaders are briefly addressed as a conclusion to Part I.

In Part II of this study, Narrative Interpretation, two exciting subtexts which emerged out of the life story research are developed. The first subtext was around the notion of living a balanced life. There will be interdisciplinary interest in the chapter from business scholars, human resource development executives, and individuals in all disciplines who find themselves challenged by the notion of living with greater commitment, purpose, and balance.

Readers will discover new insights as I reconceptualize the "goal of balancing our lives" to a "paradigm of rhythm" where chaos and complexity move together.

The second subtext is more directly related to adult development and adult learning. The most significant contribution of the entire research study may well be the narratives of development, transition, and learning which are documented over five years with one leader. Her developmental story, accompanied by an in-depth methodological and theoretical narrative analyses, contributes to the theory of narrative AS adult development and narrative AS adult learning. The theory of adult development and adult learning AS narrative is critiqued and improved upon as a result of this research. Within these theoretical analyses, transformative learning theory versus normal maturation is explored. Female and male adult development models and issues of identity within the spheres of work and love are discussed. This chapter also includes an analysis of the research relationship with questions of therapy or listening, friendship or relationship, and her story or my story.

A third method of inquiry, writing as inquiry, is explored in the closing chapter. I reveal my own preference for written over verbal reflection and share my own written paper trail of inquiry throughout this research project. I also disclose specific discoveries reported in this study that were a result of writing as a method of inquiry.

THE LEARNING IS IN THE STORY

An Introduction

It was a January day in the Midwest and I was fulfilling my routine drive to pick up our 6th grade daughter from her middle school. The sun was warm inside my truck. I don't remember if there was snow covering the ground or not. I was a bit preoccupied with final preparations for an out-of-town workshop at a major university beginning the next day. I was part of the leadership team that designed and would be presenting the two-day workshop and I was a little anxious about details. The overall topic, "The Power of Storytelling," was an exciting format for us to use with university administrators and staff participants. Our purpose was to use "story" as a vehicle for learning, leadership, and change.

Our daughter stepped up into the truck. We decided to add an errand before returning home. Enjoying my time alone with her, we began discussing the different classes she had during the day, her assignments and what homework remained for the evening. As she opened up with more and more details, she said, "Oh, and I had a test today in Social Studies."

I responded, "How did that go?"

"Great. I didn't even study," she said with pride.

"Why is that?" I asked.

"Oh, Mrs. Christensen tells us about different things using stories. Not all the time, but a lot. For this test she had told us everything using stories so I didn't even have to review my notes or book. If she teaches regular I have to read everything again," she detailed matter-of-factly.

With my mouth partially open, struggling to keep my eyes on the city street ahead of me, I asked, "Do you know what I'm going to be doing the next two days?"

We both laughed and mused over the coincidence of experiences; hers in the middle school classroom, and mine with a group of adult colleagues preparing a professional workshop around what we believed about the power of stories, because of our own personal experiences learning through stories.

This research study is not about learning "regular," it is about learning through the power of stories. Most individuals, be they five years old or 50, crave a good story. The entertainment industry's hold on our culture is in part due to media's ability to convey story and experience in vivid detail and action. We are drawn to individuals, be they in a shared classroom experience, or a social gathering, that are talented story tellers, evoking vivid mental pictures and experiences that brings tears, or laughter that touches our hearts and minds. We like to "live through" the experiences, or stories, of others. Like our daughter's classroom experience, we can learn "regular," but we can apply, compare, contrast, and likely remember, a story well told.

The two kinds of learning our daughter experiences in her social studies class reflect what Jerome Bruner (1986) characterizes as two ways of knowing: the narrative mode and

the paradigmatic, or logico-scientific, mode. The teaching my daughter describes as "regular" when she has to review and reread her textbook, is what Bruner describes as the paradigmatic, or logico-scientific. Bruner believes that this mode of teaching and learning includes logical proof, tight analysis and empirical presentation. The stories that her teacher tells and that she retains easily represent Bruner's narrative mode of learning. The narrative mode tries to convince us of its "lifelikeness" (p. 11). One of the compelling characteristics of lifelikeness are the "vicissitudes of human intentions" (p. 16) as that lifelikeness takes its shape. As Bruner explains, what makes stories great is that they reverberate inside us. Stories are compelling to us by virtue of the way they unconsciously speak what may have before been unspeakable.

The storied nature of human experience that Bruner describes is a passion of many others scholars as well. Connelly and Clandinin (1990); Crites (1986); Hatch and Wisniewski (1995); Josselson (1987, 1993); Kenyon (1996); McAdams (1993, 1996); Polkinghorne (1988, 1995, 1996); Randall (1996); Ruth and Wilkko (1996); Tichy (1997); Widdershoven (1993) and others, write extensively around their belief that stories provide the fabric, texture, and overall meaning of our lives. These writers have discovered many perspectives on stories that inform our understandings of experiences. For instance, people tell stories to others about what is most meaningful in their lives. In the telling of what is most meaningful, the complex reality of storytelling takes on several thought-provoking dimensions.

The first dimension of stories is that they are unique. No two people ever tell the same story, so when a story is told it is told from a particular point of view. Second, the storyteller's point of view, or perspective, is always changing. Our stories never stay the same. Third, our stories are never complete. Each new experience changes the meaning of the experiences that we once thought were concrete. A fourth dimension in this complex storytelling reality is that every individual has more than one story to tell about themselves. In other words, we don't each tell one story about ourselves, but a combination of multi-layered, overlapping, fragmented, always shifting, selves. A fifth dimension of stories is the way that we use them to frame our lives. We do not tell stories event by event, rather we tell connected stories linking multiple events and meanings one to the other. If these five dimensions are not enough, Widdershoven (1993) points out that the stories individuals tell may be an ideal life people would like to be living, versus the life they are actually living.

Given all of these complexities to storytelling, one might ask why stories provide a useful method for human research. Polkinghorne (1996) claims that stories, often referred to as narrative data, "provides researchers with the richest and thickest source for explicating their subjects' understanding of their own lives" (p. 92). Connelly and Clandinin (1990) summarize that "humans are storytelling organisms who individually and socially, lead storied lives. The study of narrative, therefore, is the study of the ways humans experience their world" (p. 2). The storyteller's personality and the feelings they connect to their stories provides insight into the sensitivity of topics and the meaning each narrator attaches to their stories (Ruth & Vilkko, 1996).

In the business leadership literature, Noel Tichy (1997) writes extensively about the power of stories. "Winning leaders personalize their visions and ideas by telling stories that touch people's emotions as well as their intellects. They drive their messages home with words and actions that engage and excite followers" (p. 21). Tichy goes on to say that effective leaders are those who are in touch with their own stories, using their stories as a tool of leadership. Robert Coles (1989) adds another vantage point. Coles is a medical psychiatrist, researcher, and writer at Harvard Medical School. In his text The Call of Stories, he describes the responsibility we have as listeners to allow the people who tell us their stories to own the stories for themselves. In other words, what we hear is their story, not ours. He adds that if they tell us enough we can better understand the truth of their lives. Another complexity of storytelling that Coles' explains is that when we listen to others we are simultaneously constructing our own story about their story, as well as our own story.

The mental transactions taking place in adult minds while they create or listen to stories is exposed by life course researcher and author, Gail Sheehy (1995). She says that each of us experience endless "mind chatter" racing through our brains at about 200 words per minute. Our thought processes become so habitual that they guide our daily living. "We create our own plot line. And that plot line soon turns into a self-fulfilling prophecy" (p. 169). The story-like quality of our mind's thought processes is often similar to the story-like quality of research. Meloy (1993) says that this story-like quality of research is often assumed to be unscholarly, but it is actually a strategy for engaging the mind and emotions of the reader. A good story brings the reader out of him or herself.

My responsibility is to bring forth stories that are engaging as well, and that convince you of their lifelikeness and establish their verisimilitude (Adler and Adler, 1994; Bruner, 1986; Lincoln & Denzin, 1994). Verisimilitude is described as a style of writing that draws the reader into the lives of the respondents' worlds in such a way that the reader feels a high degree of authenticity and closeness to the experiences they are reading about. By way of a brief summary, I will provide here a short synopsis of the stories you will read about in the remainder of this research study. As an intentional emphasis on the power of stories in understanding human behavior, I will refer to my research study in this chapter as "THIS Story." My task in this chapter is to establish a foundation, or "storyline," for the research study I completed. My field work, interviewing, data collection, transcription, narrative analysis, interpretation, and writing, created "THIS Story." There will only be one story like "THIS Story."

A Synopsis of THIS Story

This research study is about using the power of stories, specifically life history and narrative approaches, to understand how three high level organizational leaders experience their own human development over time. The original intention of this research was to use life history and narrative methods as a vehicle to understand the meaning of the leaders' lives. In doing so, a life history of each of the three leaders was collected and is retold in Part I, Life Stories of Leaders. The life stories and narratives of the three leaders, combined with the

process of interpretation and writing, led me to two exciting subtexts related to these leaders' lives of development, transition, and learning.

The first subtext emerged as a curiosity on my part around how these leaders "balanced" the competing demands on their lives and schedules. In the leaders' narratives I heard them define "balance" from varying time frames. The leaders' narratives also described how the pace of their lives, their personal and professional identities, and how they each seek to live lives of commitment and purpose. Their narratives allowed me to reconceptualize balance as a paradigm of rhythm, rather than some kind of delicate attempt or goal of achieving balance. This narrative analysis and theoretical contribution is presented in Part II, Narrative Interpretation.

A second subtext emerged during the life history and narrative gathering with one female leader who began to use the process of our time together as an opportunity to evaluate her life, her identity, and then move through a major midlife transition. Our experience together led me to a closer examination of adult development and adult learning theories. In particular, the theory of adult development as narrative and the closely related theory of adult learning as narrative, became a tight fit for the experience of this leader's life change. This developmental subtext contributes an exciting case study in Part II which supports narrative as a theory of adult development and adult learning in the practice of adult education.

Readers who will likely find this research study of value will be those studying life history and narrative approaches to understanding the meaning of lives, as well as those interested in a rich analysis of narrative methodology and processes. There will be

interdisciplinary interest in the chapter on living a balanced life. Through the interpretation of these leaders' lives, their life stories, and the challenges facing high level organizational leaders readers will find thick descriptions, analyses, and questions. Business scholars, human resource development executives, and individuals challenged by the notion of living their lives with greater commitment, purpose, and balance will discover new insights in the reconceptualized notions of balance as "a paradigm of rhythm."

Through-out the entire study, scholars and practitioners in adult education will find the study steeped in adult development and adult learning analysis, theory, and inquiry. The most significant contribution of the entire research study may well be the narratives of development, transition, and learning which are documented over five years with one leader. Her developmental story, accompanied by an in-depth methodological and theoretical narrative analysis, contributes to an emerging contribution to narrative as a theory of adult development. The theory of adult development as narrative is critiqued and improved upon as a result of this research. I will now continue to develop the setting for THIS story by describing my research curiosities and worldview at the onset of the study.

How THIS Story Began

I have always had a fascination with organizations and how they function. Over time I have come to believe that high level leaders within organizations are absolutely essential to a positive workplace culture and the overall success of the organization. Maxwell and Dornan (1997) assert that leaders are defined as such by the simple fact that others choose to follow

them. These authors, along with Covey (1991), Covey, Merrill and Merrill (1994); Senge (1990); Senge, Kleiner, Roberts, Ross and Smith (1994); Rosen (1991) and Kouzes, Posner, Kouzes, and Peters (1995); Kouzes, Posner, and Peters (1996) agree that leaders have an exceptionally influential role in organizations, adding that by their very presence, leaders shape the minds and thoughts of those in the organization. Because of this influence, the participants in this research study are organizational leaders, i.e., chief executive officers (CEO), presidents, principals, business owners and entrepreneurs. Scholarly literature often refers to these kinds of leaders as "elites." Elites are considered to be the influential, the prominent, and the well informed people in an organization or community (Marshall & Rossman, 1989; Hertz & Imber, 1995). Because of their experience, elites can often provide a scope and framework for a topic that others in the organization would not be able to provide. Elites often synthesize social, political, cultural, and economic factors better than others in an organization. For the purposes of this study, I will use the terms "leaders" and "elites" interchangeably. By focusing on elites, this study positions itself for reference among other leadership studies across disciplines.

My curiosity with these leaders did not stop with the organizations they lead, but rather, my curiosity was with the "wholeness" of their lives. This curiosity with the "wholeness" of life was spawned by my own observations over time in and out of organizations. What I noticed, and personally experienced early in my career, was a perception that individuals were largely compartmentalizing their lives at work from their lives at home. This seems counter-intuitive to my natural instincts. To me, it is my whole

self, my spiritual, emotional, mental, and physical being and learnings, that when blended together make up who I am. The learning that takes place in one part of my life is vitally transferred to other parts of my life. Organizational leaders, cognizant of it or not, provide for others a role model for the whole of life. I wanted to have the opportunity to study not only organizational leaders, but leaders who others saw as serious, successful, and wise about the "wholeness" of their adult development and learning.

Prior to actually beginning this study, I had for years been exploring curiosities and questions about the lives of leaders. When queried about my research interests I repeatedly shared what seemed like a rather unclear picture of the kind of leader I was looking for. I would say something like, "I'm looking for high level organizational leaders that others respect and admire for the way they live their lives in and out of the workplace." I would then stammer, pause, and look to the sky a little and continue. "I'm curious about how these leaders choose to spend their time, how it is that they keep their careers growing, and what it is about them that others admire." These word pictures always felt awkward to me and I was certain others would ask for more details. But, to my surprise, as I shared these research interests, individuals would say, "I know just who you should talk with." Or, "you have got to talk to so and so, they would be perfect." So a concept I feared was difficult to describe, was without exception, clear to others. This suggests to me that as people we can somehow instinctively identify leaders living lives of distinction. We seem to know "wholeness" when we see it modeled in others, and we are attracted to and remember leaders with these qualities. Hence, the participants in this study were identified using purposeful sampling (Bogdan &

Bilken, 1992) and they were identified over several years. The curiosities I had about leaders' lives related to the position my own life was in at the time.

When I initiated this study my own career was escalating, my family commitments were growing, and I was challenged by the choices facing me on a daily basis around how to invest my time and energy into that which mattered most. I was anxious to learn from leaders with experience outpacing my own. I believed that their stories would be instructional for me. The elites who agreed to participate in this study were frequently described to me as men and women of integrity and people others said they had learned a great deal from. They were described as individuals who were lifelong learners, and seemed to always be actively pursuing their own personal and professional development. These leaders were revered by others because they seemed to have their lives well "balanced." When others described these leaders to me they would discuss not only the leaders' work lives, but their contributions to the community-at-large, volunteer service, their family lives, their strength of character, and their positive relationship skills in and out of the workplace. I piloted this study with one male business leader prior to this study.

During the participant selection process I gathered over 20 potential leads. From those I contacted half personally, pursuing our mutual interests in working together. I conducted in-depth initial interviews with five elites. One elite I chose not to continue working with because he didn't seem to have the level of authenticity I was seeking. Another elite declined further work with me due to a demanding schedule. The three elites that continued with me through the duration of the study were involved in worldwide agriculture,

banking, and education. Their stories are uniquely their own to tell. The differences between them and the uniqueness of their own lives and careers yielded depth and breadth to the overall research questions and narrative process.

The Leaders in THIS Story

This study was never intended to be a complete review of every leadership issue professionals face, or to understand the culture of the organizations within which they work. My intention, through the methods of life history and narrative research, was to know these leaders in the wholeness of their lives--personally, professionally, spiritually, and emotionally. I came to them with no intention of judging their stories as "right" or "wrong." Rather, I was curious and intrigued by their success, the way others revered them, and humbled by their availability to me.

The leaders that participated in this study have spent the majority of their lives and careers in Iowa, though their work has taken them across the nation and around the globe. The leaders were Ann Wagner-Hauser of Des Moines, Merrill Oster of Cedar Falls, and Celia Burger of Iowa City. Ann Wagner-Hauser was in her 40s at the time of this study and had spent 20 years working in the banking industry as President of Norwest/Wells Fargo in central Iowa. By the time this study concluded, Ann had resigned her position with Wells Fargo and was embarking on a very different phase in her adult life. Oster is a successful entrepreneur with multiple worldwide agricultural businesses. He is a journalist and an active social philanthropist. He was in his late 50s at the time of this study. Celia Burger's career

has been in education. She was in her 60s at the time of this study. When the study began Celia was the principal of a high profile progressive elementary school in Iowa City. She was also part of a select 12-school national initiative in education. By the time this study was completing, she had joined Breakthrough to Literacy, a division of McGraw-Hill Publishing, and was involved in developing and writing early literacy curriculum. Celia is a cancer survivor. The leaders life stories are retold in Part I, Life Stories of Leaders, with each life story titled in their name. Brief biographical sketches on each elite appear in Appendix A.

When I began this study I explained to each leader that I would protect their identity in this research and I was committed to do just that. All three signed the request for anonymity and we proceeded. However, when I first met with Merrill Oster, he expressed his desire to use his own name, saying, "This is my story, I don't have anything to hide." A couple of years later, Ann Wagner-Hauser said during our time together, "I think I'd like to use my real name. I like the story I'm sharing." Celia Burger originally felt her identity could impair a reader if they actually knew her. She said, "My real life and this story may not be the same." Later I asked her if she would consider using her real name, explaining that I thought the story I was writing would be honoring to her. Celia agreed as well.

Over the years, I interviewed each elite at least four different times for a minimum of two hours per visit. I shadowed them in their workplaces; I reviewed writing contributions they had created; I also spent time interviewing colleagues with whom they worked closely. I began working with Ann Wagner-Hauser early in my study. Given our additional time

together, I met with her on at least a dozen occasions, spanning more than five years. My relationship with these leaders is respectful and ongoing. We are now colleagues and friends.

The Theoretical Plot for THIS Story

My task has also been to situate the stories of these three leaders in a scholarly discussion related to the narrative study of adult lives. I see this as the theoretical "plot," or the guiding theme, for THIS story. From my perspective, there are several related theoretical areas that provide insight into this topic. I admit that other disciplines and theories are likely relevant, and could be adequately applied to the narratives. However, every question, every interview, every thoughtful answer, every piece of interpretation, and every sentence developed, ultimately had to do with adults learning. Therefore, over the years of my scholarly preparation and experience, the theories of adult development and adult learning have remained most astute and comfortable to me, hence I find them to be most fitting for this study. Specific theories will be introduced in this chapter and later expanded upon as the narratives guided the theoretical analysis. They include: adult development and adult learning as narrative theory (Cohler, 1982; Crites, 1986; Freeman, 1991; Gergen & Gergen, 1986; McAdams, 1993, 1996; Randall, 1996; Rossiter, 1999a, 1999b; Singer, 1996), adult transformative learning (Argyris, 1993; Brookfield, 1987, 1990, 2000; Freire, 1970; Mezirow, 1990, 1991, 1994, 1995, 1996, 1998, 2000; Schön, 1983; Taylor, 1997, 2000), theories of adult development and identity (Atchley, 1989, 1999; Baltes, 1993; Bateson, 1990, 2000; Belenky, Clinchy, Goldberger, & Tarule, 1986; Bolton, 2000, Cafarella & Olson, 1993;

Gilligan, 1982; Hayes, 2001; Josselson, 1987, 1996a, 1996b; Ross-Gordon, 1999; Ryff, 1989, 1991, 1995), workplace identity theory (Riverin-Simard, 1988), and theory integrating work, love, and learning (Hansen, 1997; Merriam & Clark, 1991).

Adult Development and Adult Learning Theory as Narrative

In my opinion, the main point in the theory of adult development as narrative is what adult development contributes to adult learning. Suffice it to say that some adult education scholars prefer not to separate adult development from adult learning. I have come to believe, like Courtenay (1994), that adult learning is an intervention into the ordinary business of life with the purpose of creating change, either a change in knowledge or a change in competence, or a change in behavior. Adult development leads and complements learning in adulthood. "We are certain that the connection between adult development and adult learning will continue to be a fruitful one," says Clark and Caffarella (1999). "We suspect that more attention will be given to the interaction of learning and development in the future, especially to the impact of one on the other" (p. 100).

Tennant and Pogson (1995) also lay claim to their conviction that "adult learning and adult development are inextricably bound" (p. xii). They explain that there has always been a relationship between adult learning and adult development, but the relationship has been sequential; (a) how the findings in adult development, (b) inform the practices of an adult educator in, (c) the improvement of adult learning. Tennant and Pogson believe, and I support, that adult development theory researched alone does not have the potential impact

on adult learning that the two researched together can provide for promoting more effective adult learning. I have also found as I have studied adult development as narrative, and adult learning as narrative that they are inextricably bound in a joyful union. Therefore, my position is to support the connection of these two related fields of study and to discuss them in an integrated manner.

Adult education scholars in their most recent review of the literature on adult development theory (Clark & Caffarella, 1999) and the literature on adult learning theory (Clark, 2001; Merriam, 2001) conclude with calls for a more integrative and multi-faceted study of adult lives. The scholars encourage new research that focuses on a more "holistic" view of development and a "wholistic" view of learning. These words, "holistic" and "wholistic," beg for further clarification as it relates to this study. Both are used in the emerging writing on adult development and learning theory. I find myself desiring to use both, but for slightly different purposes. I consider "holistic" to refer to the multiple, integrated ways in which we learn as adults from our society. This means they may learn through an unplanned crisis, through the patience of a child, through a traditional class, through years of experience on the job, and in tacit, unobservable experiences. Adult education scholars recognize that no one process or technique for learning is preferred for adult development and learning. I consider "wholistic" to refer to the multiple dimensions of our human existence, like the qualities I sought in the leaders in this study--social, emotional, physical, spiritual human beings. For instance, our spiritual emotions contribute to the way we feel about our physical selves, and a physically fit individual is likely better prepared for

intellectual challenges, etc. This term, "wholistic," will be used in this study to refer to the integration of an individual's body, mind, and spirit for the mutual synergy one gets from them all. "Holistic" will refer to the multi-faceted, dynamic ways we learn as adults over time.

Caffarella and Clark (1999), Clark and Caffarella (1999), and Merriam (2001) each recognize the significant contributions of many scholars to the theories of adult development and learning over time, but they admit that they are especially intrigued and encouraged by new approaches, specifically the narrative study of lives, that afford the opportunity to understand adult lives in ways that allow the researcher to employ more than one framework for interpreting experience. For instance, citing Merriam (2001):

> The adult learner is seen wholistically. The learner is more than a cognitive machine processing information. He or she comes with a mind, memories, conscious and subconscious worlds, emotions, imagination, and a physical body, all of which can interact with new learning. (p. 96)

As an introduction to this chapter I told the story of my daughter's preference for learning through the stories her teacher told in social studies versus teaching "regular." I also introduced the power of storytelling across many disciplines as a way adults make meaning of their experiences and their lives. Listening, telling, and creating stories, our own and others' stories, is somewhat common nature to each of us, yet it is a relatively new orientation for looking at adult development and learning. Rossiter (1999b) explains:

> When we understand that the process of human meaning making takes a narrative form and that people understand the changes over the course of their own lives narratively, we can appreciate the value of the narrative orientation to the study of development. It is an approach that attempts to describe development from the inside as it is lived rather than from the outside as it is observed. (p.78)

Rossiter (1999b) goes on to explain that developmental change is experienced through the construction of the narrative. She explains that every narrative, or story, is revisited many times over the life course and is enlarged, or changed based on continuous new learning that may alter the meaning of the original story. The advantage of narrative knowing is that it naturally integrates the "cognitive, affective, and motivational dimensions of meaning making" (p. 78). Other scholars studying the narrative development of lives and the notion that narrative is always "development in process" include Singer (1996), Gergen and Gergen (1986), Crites (1986), Randall (1996), and Freeman (1991). McAdams (1993, 1996) explains that the narrative tone which we begin to tell stories about ourselves in adolescence likely stays with us for a lifetime. The assumptions of these scholars around narrative models of development are to combine inductive processes, contextualized knowledge, and human intention for the purposes of describing and interpreting human experience. The emphasis on this theory of development is reflective of my preference for its application to my research. Other theories are purposefully more brief.

Adult Transformation Theory

Simply put, transformative learning is only transformative if an adult has fundamentally changed how he or she thinks or acts as a result of critical questioning and reflection on their long-held assumptions about their lives, their past, or the society in which they live. Jack Mezirow (1990, 1991, 1994, 1995, 1996, 1998, 2000) is credited with the most influential role in advancing the theories of transformative learning theory among adult educators. In Mezirow's (2000) most recent analysis of this theory-in-process he integrates even more of the wholistic features of adult development into his understanding of what it means to experience transformation. He also seeks to make the theory easier to understand by changing his discussion of "meaning perspectives" to "frames of reference;" and he changes "meaning schemes" to two dimensions he calls "a habit of mind" and a "resulting point of view." In my review of Mezirow and his associates' most current scholarly debate related to transformation theory I was struck by the subtle shifts in this theory that emphasize narrative qualities of process and theory building.

For instance, Kegan (2000) encourages the progressive motion of the mind and the desire as adult educators to see learners as individuals with a "self-authoring mind" (p. 68). Daloz (2000) and others point out that Mezirow's often cited reason for transformative learning beginning in a disorienting dilemma, is equally as likely to be a long, gradual process of adult development and change, which is the experience of Ann in this research study. Brookfield (2000) makes a passionate claim for increased rigor in the reflective process of transformative learning, saying that scholars and practitioners are guilty of using the term

"transformation" so often that it has lost its distinctive qualities. In my opinion it takes careful analysis of adult change to determine if it was in fact transformative versus developmentally "normal."

Theories of Adult Development and Identity

The developmental nature of narrative often merges with discussions in adult development theory around issues of identity and gender. Through the storied nature of narratives, adults can't help but discuss their own identities and how it is they are changing over time. The early contributions to adult developmental theory often studied men. In so doing models for adult development were based on the male experience (Levinson, 1978). Gilligan (1982) was first to point out through her research that women's experiences of adult development and identity formation may be quite different. In a current review of gender development and identity, Ross-Gordon (1999) points out that although male and female identity development is often different, that does not mean that there is "one" developmental path for men and then "one" developmental path for women. Rather, she reaffirms that developmental paths are also individually constructed as adults lead individual lives and have unique experiences. Because of the combination of social and gender influences on individual development, female identity is often best understood through narrative analysis. Theories of women's development offered by Bateson (1990, 2000), Belenky et al. (1986), Bolton (2000), Gilligan (1982), Hayes (2001), Josselson (1987, 1996a, 1996b), Merriam and Clark (1991) and others are specifically discussed in Part II, Narrative Interpretation.

It is not within the scope of this study to provide an in-depth review of the interesting contributions to male and female development and identity formation, or adult developmental theory in general. Suffice it to say, however, that my research led me to biological, psychological, and stage and phase theories of development, across multiple disciplines. The theories of successful aging (Baltes, 1993), theories of "selective optimization with compensation" (Baltes, 1993), and theories of "shifting horizons," (Ryff, 1989, 1991, 1995) were each interesting, but did not provide the methodological qualities I preferred for in-depth study and analysis.

Workplace Identity Theory

In a particularly compelling analysis of workplace identities, Riverin-Simard (1988) conducted research on what she called the "phases of working life." By asking 786 working adults in Canada between the ages of 23 and 67 to describe their past working experiences and their future work expectations, she identified two very clear types of working identities: The first identity she named "biologicals," and the other she named "exceptionals." Riverin-Simard arrived at these definitions for "exceptionals" and "biologicals" based on the self-expressed narratives and examples the individuals in her study shared. Based on the language and examples she heard over and over she developed her framework. The biological model of development went as follows: Ages 23-37 were seen as a period of growth, ages 38-52 were seen as a time of plateauing or stagnation, and ages 53-67 were seen as a period of decline. In

each of these three age categories Riverin-Simard identified 85% of her participants who fit the "biological" description of development--growth, plateau, decline.

The remaining 15% in each age category of Riverin-Simard's research fell into what she identified as "exceptionals." These adults see every experience as learning. They never compromise their personal interests in the work they are doing. Rather, they always seek to integrate their interests with their work. The exceptionals protect themselves from the many demands around them, seek time for reflection, and often talk about learning as a "gift." Throughout their work lives, the "exceptionals" never allow the organization, or others, to define their own value, they reserve that evaluation only for themselves. After becoming familiar this research I am more attune to hearing the actual language of "biologicals" and "exceptionals." For instance, a mid-career "biological" often says things like, "I've only got 12 more years and then I'm going to do what I really want to do." Or, "I'm too old to go back to school. I can't learn like I used to." An "exceptional" on the other hand, might say in the early years of their career, "I'm going to try this organization/industry out, if it doesn't work or I don't like it, I'll find something else." Or a mid-career "exceptional" might say, "I've learned a lot here, the experiences have been good for me, but it's time to move on. I've got a lot I want to do." Each of the leaders in this study were unquestionably "exceptionals" by Riverin-Simard's definitions.

Theories Integrating Work, Love, and Learning

As introduced earlier, my research interests in the lives of these leaders was specifically targeted to the wholeness of their lives and holistic means in which they were learning over time. As I have discussed, the terms "holistic" and "wholistic" are being used with a slightly different focus. Research conducted by Merriam and Clark (1991) sought to integrate these two through a study pursuing men and women's understandings of work, love, and learning in their lives. The researchers were curious about the interactions between work lives and social lives of adults and how the interaction between the two impacted learning. In their review of adult development theory over time they became familiar with a variety of terms used to understand the interaction of work and love in adult lives. The terms they found for defining work and love included: achievement and enjoyment, mastery and pleasure, instrumental behavior and expressive behavior, task and people, agency and communion, preserving the self and merging with others, identity and intimacy, separate and connected, occupation and relation (pp. 16-36). These terms trace a portion of the adult development literature which attempts to describe the interaction between work and love in our lives and how together they create wholeness.

Merriam and Clark (1991) believe there should be less tension between the a person's "daylife and nightlife." In other words, instead of a dichotomy between opposing forces in a person's life, there should be a synthesis. The authors were curious if there is an interaction between the dimensions, or roles, in adult life. My belief entering this study is my own lived experience that the dichotomous parts of my being are not, in fact, at odds with one another,

but rather inform each other. My belief is that others transfer this learning as well. The difficulty then, is in describing or seeing this in the lives of others. In other words, we don't know what "wholeness" looks like, so we don't know its identity. My belief is that the integration of work and love yields not only learning, but what others may perceive as balance and wholeness. L. Sunny Hansen (1997) takes a different vantage point for the development of whole lives. She devotes an entire text to her exploration of how adult lives can be fully integrated in the context of successful career development. Her recommendations include the combination of work and family, the creation of lives dedicated to a meaningful whole, and purposeful inclusion of spirituality and expressions of life purpose. In years past it was considered inappropriate, or unprofessional, to discuss the softer issues of human development and relationships alongside professional and career development. Hansen's text breaks down that barrier and support the notions of wholeness and balance I recommend.

The theoretical plot for THIS story has as its primary focus the theories of adult development and learning as narrative, transformative learning theory, adult development and identity theory (especially women's identity theories), workplace identity theory, and the integration of work, love, and learning. This theoretical plot functions in a dualistic fashion alongside the methodological fabric holding THIS story together.

The Methodological Fabric Holding THIS Story Together

A means for coming to understand our lives and their development is to apply the methodology of narrative storytelling for the purposes of constructing and discovering the

meaning of our lives (Dominice, 2000). Atkinson (1998) says, "The life story narrative may be the most effective means for gaining an understanding of how the self evolves over time" (p. 11). He adds, "Telling a life story can help one to know one's self, others, the mystery of life, and the universe better than before and can also provide the researcher with a better understanding of how the teller sees him or herself" (p. 10).

When I queried each of these leaders about their interest in working with me (Appendix B) I explained that I would not be judging or evaluating them. I simply wanted to hear their life stories and was interested in understanding their life experiences. The life history format provided a non-threatening method for listening to the background and experiences of each leader (Appendix C). As Atkinson (1998) points out, telling your life history usually involves addressing some of the most enduring questions of human development. He goes on to explain, "As a way of making meaning, identifying life influences, and interpreting experience, there may be no better method than the subjective nature of the life story to help the researcher understand a life from the insider's point of view," (p. 13). To be even more explicit, Casey (1993) says in her life history research with 33 teachers, she began by asking them to tell her their life story. But she said over the duration of her research, the question they were really answering was, "Tell me the meaning of your life."

The stories that we tell about the meaning of our lives is what Polkinghorne (1988) and others equivalently call narrative. It is in the narratives we tell that our self concept reveals itself to ourselves and others. Polkinghorne (1995) defines other aspects of narrative

methodology, in particular a "narrative analysis." In a narrative analysis a database of stories has been collected and the researcher begins to look for common knowledge and general themes apparent in many narratives. "Narrative analysis synthesizes or configures events into an explanation of, for example, how a successful classroom came to be, how a company came to fail in its campaign, or how an individual made a career choice" (p. 16). Polkinghorne points out that all elements of the narratives cannot be included in the narrative analysis and those parts which do not conflict are omitted in what he calls "narrative smoothing." The end result of a narrative analysis is not unlike the presentation of a piece of artwork or a play. Polkinghorne explains that the analysis should hold together in an interesting and dynamic fashion, with the ultimate function being to "answer how and why a particular outcome came about" (p. 19).

In the case of this research study there are two major narrative analyses developed as a result of the life stories collected over time with the three leaders. These two in-depth narrative analyses present the challenges leaders face in balancing their lives, as well as the developmental story of one leader's midlife career changes. They appear as Part II, Narrative Interpretation. In each of these narrative analyses, in keeping with Polkinghorne's definitions, my role as author was to provide my interpretations of, and answers to, the "why" and "how" of balancing lives of leadership, and midlife career transition.

There was growth and change in the participants and in myself over the duration of this study. Our lives shifted, we made new career decisions, we adapted to new living situations, we took risks, and we kept many parts of our lives the same. For me, human

inquiry in the social sciences is the art of understanding and making sense of experience--my own, the participants I am working with, the relationship between us, and the social significance of those experiences to the community-at-large. As Reinharz (1992) points out, this type of methodology is often desirable to women that do not desire to control anyone, but want to develop "a sense of connectedness with people" (p. 20). The concept of "engagement" or "connectedness" rallies my heart and my intellect around the goal of meaningful research.

"The act of knowing from our own experience 'is so simple,'" says Alice Walker (cited in Christ, 1980, p. 43) "that many of us have spent years discovering it. We have constantly looked high, when we should have looked high--and low." This comment, "constantly looking high, when we should have looked high and low" resonates with me. I often seek peak experiences and the most challenging scholarly reading, thinking in that I will discover the deepest learnings of life. That has rarely, if ever, been the case. The leaders in this study often shared simple reflections on everyday experiences, yet through those very comments, I might gather new insight to the underlying assumptions of human behavior, or learning over a lifetime.

The Moral to THIS Story

When I embarked on this research study I trusted the methodology of naturalistic inquiry, and specifically the methods of life history and narrative processes. I trusted that these methods would yield substantive data in the area of my interests and passion as a

researcher. These methods have served me well and exceeded my expectations in three significant ways. First, I have always believed that adult development and learning processes facilitated with astute attention to the needs of the adult learner, look frighteningly similar to the methodology of naturalistic inquiry. With that paradigm in place, I subconsciously approached each leader and our time together as a learning context, and each conversation as an opportunity to encourage the development of that leader and our mutual understandings. In so doing, I know that each leader felt the investment of their time with me had also been an investment in his or her own development. This was overwhelmingly apparent in the midlife transition and developmental changes experienced by Ann Wagner-Hauser and analyzed in Part II under the title, Adult Development as Narrative: The Surprise Case Study.

The second significant contribution of this research was in the discovery, again through the methodology of naturalistic inquiry, and specifically the methods of life history and narrative, of a new way of conceptualizing the notion of balancing our lives. I had spent years investigating this topic and read the most current approaches and philosophies to creating a life of balance, in particular in the business and leadership literature. But it was through the narratives of these three leaders that I discovered, in the lived experiences of their lives, that the notion of balance that I and others were trying to live out was never going to yield a rich harvest in my life. There was very little in their lives that looked balanced by my way of thinking. Yet, upon closer investigation of their narratives and lives, I began to see the qualities in their character and lives that led others to describe them as balanced. My role as an adult educator will be to share this renamed discovery with others. The full story of

balance as I came to understand and rename it is in Part II, and is titled, Understanding Leaders' Lives: Moving From the Goal of Balance to a Paradigm of Rhythm.

The third significant contribution that exceeded my expectations, and the final morale to THIS story, has been the quiet, unexpected realization that through the actual writing of this research I have uncovered my deepest learnings. Keystroke by keystroke, line by line, I have witnessed thoughts pouring out onto the page that I did not know I had. Prior to this research study, I had never before experienced the intensity with which my knowledge was being formed instantaneously in a heart-mind-fingertip synergy. This phenomenon, and specific examples of it, provides a complementary and validating closure to the research study as a whole analyzing writing as a method of inquiry. This final chapter entitled, "The Learning is Through the Writing," appears as a conclusion to this research study.

The development of my sense of voice, often uncovered during the writing, is intricately intertwined with the telling of the remainder of THIS story. A more complete introduction to my voice and how I have chosen to represent these elites' stories in the text will introduce Part I, Life Stories of Leaders. It is titled, "The Artwork in Life Stories." The leaders' life stories are retold in the remainder of Part I.

PART I

LIFE STORIES OF LEADERS

THE ARTWORK IN LIFE STORIES

Introduction

In social science research, the purpose of life history as a qualitative method, in its grandest intent, is driven out of a desire to understand human experience. Human experience, borrowing from the works of Dewey (1938), is inextricably intertwined between education, experience, and life--you cannot pull one apart from the other. Clandinin and Connelly (1994) have come to believe, and I would agree, that the method we use to record our intertwined experiences is through our stories. We have no better form of acknowledging or understanding our life experiences than through the stories we tell others. In an attempt to further situate life history research, Hatch and Wisniewski (1995) posit that "narrative" is a "way of knowing" widely understood to be predominately used in qualitative research; "life history" is a specific kind of "narrative" that seeks to explain, describe, and reflect upon one person's life, within the context of that person's history, location, age, and social circumstances. Polkinghorne (1995) explicates that life histories are always the history of a single life, told from a particular vantage point. Narrative, then, is a particular way of telling a story, or an analysis of a group of narratives related to a common theme. For instance, in this study, I combine narratives to discuss how three leaders' deal with the pace of their lives. As a point of clarity, there are subtle differences in the terms life history and life story; however, I find the differences to be so subtle that I use them interchangeably.

I have chosen to separate the life stories of the three elites from narrative interpretation or analysis. Rather, in the following three chapters, each leader's unique life history will be shared. However, there is no such thing as a simple life story free from my influences. As qualitative researchers, too numerous to mention, have argued, concerns about representation, voice, subjectivity, researcher-researched relationships, and ethics, are always matters of concern. Therefore, prior to presenting the life stories of Ann, Merrill, and Celia, I will discuss these concerns.

Representation

Writing life history and narrative is an art. My own respect for this art has grown increasingly appreciative of the choices that are mine to make in the construction of a life. This construction, this writing, has been and always will be, an integral part of the research itself (Richardson, 1994, 1997). At every turn I experience some degree of angst around representation of another individual's story. Initially I thought the task an easy one, a bit like moving water from a faucet to a water glass: I was the pitcher, or the vessel carrying the story from an individual to the page. The water might move around, even spin in circles from time to time, but all in all, the water, the words, would pour onto the page. However, my theoretical discoveries around representing a life have not been that simple.

Do I try to share only the facts of an individual's life? Do I try to share a history of an individual's life? The facts could include: place of birth, family of origin, schools attended, grade point averages, college degrees, career path, spouse or no spouse, children or

no children, honors, goals, and perhaps those experiences that support the facts of a life lived as told. The goal of this style of life history is to share the person with the utmost authenticity of representation absent authorial interpretation (Stronach & MacLure, 1997). However, in an attempt to present a history of the individual, questions could be raised about how I determined what to share and what not to share. What authority did I have to make those choices? In other words, wouldn't I always fall short of pure authentic representation?

Another alternative is to tell a story that leaves the reader feeling as if they had been with me during my time with the individual. This style of story resembles a portrait on paper. Individuals who knew the individual would, after reading the portrayal, be confirmed in "knowing who this is." This portrait, however, would be formulated through my eyes. Would I want to tell a palatable, comfortable story? What is going untold? What facts might be omitted from a story set out to persuade the reader of its lifelikeness to the individual (Ochberg, 1997; Stronach & MacLure, 1997)?

Given these dilemmas of representation, I have chosen to share a story of a life, versus a history of a life. My desire is to leave you with a portrait of my experience of being in relationship with each of them. My attempt is to represent the leaders to you as I came to know them. I acknowledge that in doing this I am persuading you, and them, of their stories. I acknowledge that I felt privileged to be with each of them and that I, by nature, have always seen the good in those I spend time with. As Laurel Richardson (1997) explains:

> The story of a life is less than the actual life, because the story told is selective, partial, contextually constructed and because the life is not yet over.

> But the story of a life is also more than a life, the contours and meanings allegorically extending to others, others seeing themselves, knowing themselves through another's life story, revisioning their own, arriving where they started and knowing "the place for the first time." (p. 6)

The life stories that follow are my representations of lives lived. I acknowledge that it is textually bound. The artwork that represents the lives of these leaders is flush with my voice, which leads to the second distinct dynamic of these methods.

Voice

This study is first and foremost about allowing these leaders to tell the story of their lives. Make no mistake, though, the responsibility for these life stories is mine. The telling was mine to do and I humbly acknowledge this privilege. I made the primary decisions about what to include and what to exclude. What I have just described is what the literature around life stories and narrative refer to as "voice." My statements, "the responsibility for these stories is mine," and "the telling was mine to do" acknowledges that as a researcher I have something to say. There is always a dilemma of voice when it comes to writing up the research. How much of the participant's voice should be included? How much of my own voice should be heard? I know that what I observe, what I hear, the connections that I make through conversation and listening, through reading and writing, are sound. Krieger's (1991) work has served to encourage me when she explains that, "We must teach ourselves that the individual view need not be apologized for and that we have a right to be part of what we

know" (p. 55). I know that the methods used in this research made it imperative that my voice be ever present in the text. I am the human instrument of inquiry.

Clandinin & Connelly, (citing Geertz, 1994) point out that there is "no more difficult dilemma for a writer than sorting out how to be in the text" (p. 424). Geertz says that there are multiple forms of "being there" in the field, as well as multiple forms of "being there" in the text. Clandinin and Connelly name this dilemma of "being there" in the text as a research "signature." The goal, as they point out, is to determine how lively or obscure the researcher's voice should be. An overly vivid signature distracts from the participant's voice; a signature that is too thin allows the text and theory to speak in place of the researcher. Ideally, these scholars point out, a signature has "rhythm, cadence, and expression that marks the work" with the researcher's identity (p. 424).

The framework I developed for myself, and to assist with the dilemma of voice is to limit my voice when I share these leaders' life stories. My desire is for the reader to come to know them as I came to know them. There is limited narrative analysis and no theoretical text in any of the life stories. As Mary Catherine Bateson says, (cited in Emihovich, 1995) "There's no need to drain intelligence out of situations where emotions are important" (p. 40). I believe I have respected the leaders' emotions and the meaning they give their lives by staying out of the life story texts as much as possible. In so doing, the shifting, complex, and interesting lives of these leaders is spotlighted, which leads to the dynamic of subjectivity in narrative and life history.

Subjectivity

The term subjectivity is defined by Weedon (as cited by Bloom, 1995) as "the conscious and unconscious thoughts and emotions of the individual, her sense of herself and her ways of understanding in relation to the world" (p. 111). Subjectivity becomes a critical element of narrative and life history research because of the multiple subjectivities present in both the researcher and the participants. Bloom (1995, 1998) clarifies that feminist scholarship has adopted the term, "nonunitary subjectivity" to explain the phenomenon of female subjectivity that is constantly in motion, or in production. Acknowledging Bloom's nonunitary subjectivity concept, as I worked with each of the leaders in this study we were never in a fixed position in our lives or our stories about our lives. In addition, we occupied multiple positions and fragmented realities all the time. There was also in motion the intersubjectivity between the elites and myself: we were both changing and shifting all the time, so the nature of the relationship and experience between us was constantly shifting. Therefore, it is important to keep in mind throughout the reading of life stories and narrative that "interpretation, like subjectivity, is constantly in flux and constructed through a continuous process of interactions" (Bloom, 1995, p. 110). Having said that, I agree with Bloom, that my own "subjectivity should never be veiled, discounted, or reduced." Subjectivity, then, contributes to the aforementioned elements of representation and voice as partners in narrative and life history research. Subjectivity is also a concern in the research relationship.

Researcher-Researched Relationship

In preparation for this study I have spent a great deal of time coming to understand the researcher-researched relationship. It has likely become apparent that my "way of being" with these leaders was open, positive, and without judgment. One of the unique qualities of this research study is that I have been involved in what is called in the research literature as, "researching up" (Hertz & Imber, 1995, Nader, 1972; Ostrander, 1993). More often, a researcher is studying peers or those of a lower social standing. I have a fair amount of experience working with high level organizational leaders as peers, however, because I needed these leaders to complete my work, I did to some extent approach them similar to a journalist in hopes of getting a big story.

I found it particularly pertinent to cite the call of Clandinin and Connelly (1994) as it relates to the researched relationship. They explain that entering into any research relationship offers up the opportunity to understand people different than ourselves. "As researchers, we cannot work with participants without sensing the fundamental human connection among us; nor can we create research texts without imagining a relationship to you, our audience" (p. 425). This passionate insight into the chemistry of research relationships and the ultimate power possible to all involved rivets my soul. There can be no more personal and enlightening experience than to come to know someone different than ourselves, with experiences different than our own, in a deeply personal way. Every deeply personal relationship we have in life touches us and changes us. There is responsibility in

relationship. It is this deeply personal knowing that leads to the final dynamic cited here as preparation for reading and understanding the life histories.

Ethics

The previous two elements described here, subjectivity and the deeply personal nature of the research relationship, signal caution signs as well. Because we as humans are constantly living, telling, reliving, and retelling our stories about ourselves alongside researchers who are also living, telling, reliving, and retelling their own stories, we set up the opportunity for stories to be told that may not be the story the participant would like to have had told. Every paragraph of interpretative analysis poses ethical considerations around what to include and what to exclude. Price (1996) said that after her own thorough analysis of ethical issues in qualitative research she began to see a theme of "to your own self be true" (p. 208). As she continued she crafted the self-regulating theme, "compromise the research rather than compromise the participant" (p. 208). What I understand Price to recommend is caution over carelessness when decisions of what to include from a participant's story is in question. If for any reason the inclusion would compromise the participant, Price would say the research should be compromised instead. I have come to understand this myself. A temptation I experienced in this research study was the desire to tell a story I wanted told in place of the story the leader wanted told. As we shared our different versions of the story, we came to understand why we each wanted to tell different stories. However, I must own up to my story and allow the leader's to be heard. In addition, the shelf life of research texts

exceeds the initial collection, interpretation, and writing of the research. Therefore, we must be very cognizant of the stories we create that live on beyond us and the impact they will have on our participants.

With this introduction to the life stories of Ann Wagner-Hauser, Merrill Oster, and Celia Burger, I have sought to describe the uniqueness of narrative and life stories in the family of qualitative research methods. I have also explicated five of the distinct dynamics of these highly personal methods of inquiry: representation, voice, subjectivity, the research relationship, and ethics. In providing this introduction, my intent has been to reveal more of my theoretical support for life history and narrative method as well as provide a more meaningful understanding of my presentation of these leaders' lives. I will continue with additional methodological analyses in the interpretitive section of this study.

THE LIFE STORY OF ANN WAGNER-HAUSER

What I noticed first were her heels. I've long known that tall males are often targeted for leadership positions based on the assumption that height is a favorable leadership quality. I immediately decided this was no longer a perception but a reality. Ann's presence convinced me in about 60 seconds that she knew what she was doing and was deserving of my admiration and respect. I felt fortunate to be with her.

A mutual colleague had convincingly led us to each other so it seemed any inhibitions about working together were mute. I wanted to spend time with a high-level female business leader that loved learning in all areas of her life. I wanted to explore life's questions and learnings, past and present, with her. I wanted to have access to her professional life, her personal life, and her character. I wanted to hear her stories of too little time, the pressures and desires to succeed, and the quest to live life in a balanced way. The request was uncommon and intrusive.

But Ann demonstrated what I am coming to know about high level leaders who are asked to share a part of themselves to develop others--they extend a warm, "yes, of course, I'd be honored." The pattern is overwhelming and instructive. Their focus is often on serving others, versus protecting themselves and their time.

Over the course of five years Ann and I spent a lot of time together. Each conversation seemingly picking up where the last left off. Our early meetings were always at her office. As time passed and our relationship grew we met in her home and at local

resturants. When we would meet at her office, I was required to leave my name with a uniformed officer until she would appear from behind a large, wooden access door to her suite of offices. Ann gave generously of her time and enthusiastically worked together with me throughout this research project.

What I came to especially appreciate about Ann was her incredibly contemplative nature. During our conversations she was always mixing together her abilities to think, assess, reflect, and then comment on a topic almost at the same time. Her eyes would look upward but she would keep talking. There were never long pauses. She thinks deeply about every sentence simultaneously as it is created. While she exudes this deep sense of passion for her ideas, she also exudes a warm sense of caring and connection for the person she is talking with. I saw this over and over again, the integration of warmth and competence. She was very much female, but very much in charge.

Ann's Life Fabric

Ann graduated in the top 15-20 percent of her graduating class of over a 1,000 students. She was a national thespian when she graduated from high school. In college she received a Bachelor's degree in Business Administration. When she discusses her entry into her professional career she speaks often of a very positive mentoring relationship she enjoyed. She gives out warm accolades for the advice this female mentor equipped her with for her ensuing career.

Ann was in the banking industry for over 20 years. For most of this study's research period she was President of the Des Moines and Central Iowa division of what was once Norwest Bank. Through the acquisition of Norwest Banks by Wells Fargo, she became part of the 7th largest bank holding company in the country. She had a staff of nine direct reports. She ultimately supervised the work of 365 people. Her territory of responsibility had assets of two billion dollars, or about 43 percent of the entire organization. When Ann talks about the culture of Norwest, which was predominately the organization she spent most of her years working for, she feels privileged to work for a company and for people who were principled and honest. As a way of describing that culture she said, "I was able to speak my mind most of the time."

Ann's co-workers describe her as personable, smart, and pretty hard-charging. She confesses that she would rather have control then give it up, though she mentioned that this is changing over time. On only a couple of our last meetings did I see her in anything other than very attractive professional attire and heels. She has a great voice. I often thought she should have a career in on-air radio. She exudes energy, smiles and laughs easily, and is very personable.

Ann has been married to the same man for over 20 years. She repeatedly said that "he is my best friend." She affirms, "We talk about everything and we are very good for each other." He is also a business professional. They have no children. She cannot recall ever thinking about herself with a child. "I always knew I wanted to be married, but I just don't remember that picture including children." Upon repeated questioning she gave similar

answers. "We love our nieces and nephews and they are always welcome in our home.... but I just don't think we'll do that (have our own)."

She and her husband are best friends and seem to have mutual admiration and support for each other's careers. They are successfully sharing their unfolding lives together. I get the impression that he has similar status professionally to her. They live in an older home near the city's urban center. Their offices are near to each other, but they commute separately in less than 15 minutes. They socialize with other couples regularly, but in an average week would eat out alone, or just as likely be at home with their two four-legged kids--a german shorthair pointer and a black lab. She enjoys reading an escapist romantic novel, and he prefers nonfiction.

Ann was the third of four children; she has two sisters and a younger brother. She was raised in a Roman Catholic home. Today she would say she is "spiritual" but does not need formalized religion. She has been influenced in her religious beliefs by her husband's thinking. She said that she believes she is a "Republican economically and a Liberal socially." Her husband supports the Libertarian Party and tells her the political belief system she describes is Libertarian in nature.

She is five feet, seven and a half inches tall, though she confides that most people guess her taller. She appears to be in above average physical condition, her weight in proportion to her height. She would say she needs to work out more. She has brown hair cut at the upper neck, and blue eyes. She enjoys outdoors activities of all kinds. Though I never saw her participate in any athletic activities, by all counts she looks quite athletic and moves

with agility and confidence. Over our many interviews she often mentioned activities like roller blading, walking, fly fishing, recreational boating, and skiing.

Over the last 17 years Ann has cultivated and maintained a very close friendship with two female professionals. The three originally worked for the same organization. This threesome has been the cite for in-depth conversation and life reflection--it serves as a constant anchor in her sea of personal and professional life experiences. She talks about them often and with warm compassion.

The Priority in Ann's Life Story

From the first moments of our first interview, Ann told stories about her family. Most often they were about the wonderful home life her parents provided. As years pass she recognizes the contributions this has made to her life. She recollected character shaping qualities from her father and her mother many times. I never detected favoritism. She seemed to view them as a "team," though her stories about them were of their individual character contributions. "I grew up in la-la land," confirms Ann. "I mean, I just had wonderful parents and lived in great neighborhoods with great kids. . . . They influenced me so much."

She first described who her parents were by the educational degrees they had acquired. "My mother was an English major and my father had his undergraduate degree from Loras and his Master's in Economics from the University of Iowa." She describes her mother and father as the best of friends, with a fabulous marriage, and overall good people. She reflects on her introduction to business acumen.

> My father having been in business, and having had the traditional dinner parties at home. . . we met people he worked with and I was very comfortable in those environments. . . . I knew the protocols, I knew the niceties, the goodwill . . . that helped me tremendously.

Ann's father passed away almost 10 years ago. With a great deal of authority Ann describes him as a gentleman, "in every essence of the word." She continues, "He was the kindest, most caring, thoughtful man. Yet he was nobody's pushover. I think very highly of him. I miss him terribly." She said that anyone who knew him would say that he had an incredible comfort with life. "He liked everything. . . . He could see the best in people. He saw the best in situations." She expounded on the large, diverse audience at her father's funeral and the large numbers of people that expressed how her father had been a mentor to them. She has always admired how her father accomplished so much in his quiet, gently way. She admits that this informs her own sense of character as a way of getting things done through others.

Ann describes her mother as one of her mentors because of the way she has always lived her life. She says her mother is continually learning.

> She has an incredible amount of acceptance of her own frailties, her own humanness. So you talk with her and get a little humble. She tends to make you look at yourself and examine things in life, because she's examining them.

Ann's mother is an avid reader. She frequently engaged her children in experiences that would expose them to different aspects of culture. As a Roman Catholic, Ann's mother

took her to nontraditional masses; she didn't let the children eat grapes because she was picketing for the rights of migrant workers; and she involved the children in her activist events when possible. Ann describes her as a lifelong learner that often taught through experience. "I remember her sometimes shocking my father," Ann recalls. "She continues today, now without my father, living that same kind of purposeful life."

Ann explained that her learning took place in a debate environment from as early as her grade school years. "I found myself almost addicted to the adrenaline, the thrill and anger of battle," she described. She explains that from the earliest years she can remember always talking and debating with other family members in their home, usually around the dinner table. She explains that in the workplace she has had to learn over time how to temper the presentation of her ideas so as not to overwhelm co-workers or be too forthright in her opinions. She knows where those characteristics originated.

Another significant family member that contributes to Ann's life story is her oldest sister. "I went to her no matter what was going on in my life. She knows me better than anybody else does. She doesn't let me get away with things. She's always been my center, always." Ann says with admiration that her sister's way of being with her is always gentle.

Ann's Life Chapters

Left to her own sense of order, Ann would organize a book about herself in chronological order. This is frequently the way we see our lives over time. She refers to her first chapter by street addresses, "Zook" and "Brook," and the people who lived next door.

She can easily recount the interior of her neighbor's house, almost the exact floor plan. She would have been a toddler at that time.

A very significant chapter would be entitled, "Forgetting Junior High." She shares one specific experience:

> There was such a thing as a slam book. The first page was numbers and then people's names. You'd flip to those pages and then they'd pass the books around and write about people in them. Some things were very nice and some things were very cruel. I was lucky. I was very lucky to never be in the slam book. I wasn't either cool enough or in the kind of crowd to be in it. . . . I was really kind of odd person out.
>
> Junior High was one embarrassment after another. . . . It was when young women were getting their first bra, and getting their period...some women were very popular, and some weren't . . . . How did you fit into that? You were trying to figure out who you were and it was. . . at least for me. . . the most cruel of times. I probably came home crying more times than not. And thank God I had the support I did at home, because it was the one place I was okay, and that I could gain comfort and reset the balance and go back at it again. . . . The best thing that ever happened to me is we moved and I was out of Junior High.

The middle chapters of Ann's self-authored book would be "High School," "Wisconsin" (the first two years of college), "The West Coast" (completing her BA and

beginning her relationship with her husband). Other chapters would continue with titles, "Starting a Career" back in the Midwest, and "Buying a House" because it marked her ability to take care of herself, and of course, "Getting Married."

Ann fondly reflects, "The final chapters would be marked with a chapter for each career transition, a chapter for 'My Father's Illness,' and a chapter for dealing with the mourning after his death." She concludes by saying she would devote a chapter to her relationship with her spouse. "We are constantly working on our relationship because we're both changing and going through so many different things," confides Ann. "We work at keeping it all together. I think you're damn lucky if you do."

Ann's Way of Being

When I asked Ann if she felt she was an architect of her own destiny, or if she felt she had been lucky, she responded, "I'm lucky, no doubt. . . . I've lived under some star somewhere or I've got a guardian angel." Given that, it fits that Ann feels fortunate in "her way of being." The ability to seek a middle ground between having fun and doing well, and knowing what was most important in the moment, has always come naturally for Ann. She is an achiever, but not so driven that she neglects people or relationships along the way. She reflects on her primary and secondary education years:

> There would be teachers if you were to talk with them that would say that I cascaded by on my natural abilities instead of pushing some of that to the max, and that would be a true statement. I had more fun with people. . . . I was a B

> student with all the abilities to make A's. But it wasn't a drive for me, I didn't care enough about that. . . . It was not cool to do very well in school, or if you did, it was something you downplayed. . . . It would have been interesting to have pushed some of that a little harder, at the same time I don't look back and terribly regret it, probably given the chance I would have done the same things!

From the moment you meet Ann there is a pleasant confidence in her presentation of self. When questioned about where that confidence comes from she explains:

> I can't describe how you instill this in a child, but I've always been confident, I've never doubted my abilities to do anything I put my mind to. It was just never in my makeup to do it differently. . . . I never felt that there was anything unattainable that I couldn't live up to. I didn't feel like I got set up, it was always safe at home. It was the one place I could go with my successes or my failures and be okay, and not be judged. . . . There was not judgment. I think that maybe some of the difference, that I was able to safely learn a lesson, lick my wounds, celebrate, and those were all okay for what they were. That gave me a tremendous amount of confidence.

Ann has also come to realize that she was never allowed to feel sorry for herself. Nor is she the type of person that others feel they need to help. "I can remember going to a high school counselor one time, saying to her, I would like to one time let down my guard and be taken care of," Ann recounts. And the counselor said, "No one's ever going to do that for

you. . . . You appear to be self sufficient and very capable of handling whatever comes and no one is going to assume any different." I asked her during our interview what she thought of the counselor's response. Ann said, "I knew it!" And today she says that her husband only allows her a "pity party" for a short time and then he tells her to get over it. She admits, "I've learned to maybe do it a little bit myself." Then she laughs.

Some professionals create elaborate plans for their career development. Ann seems to carry over her philosophies from early years to her strategies for career development in her 40s. She says that she works with people that always know their plans, but admits that's never been a part of her background. "I'm much more likely to see how things go. If something happens, it happens and you just see what that brings you. I like the unknown and will even stir the pot to make that happen," she reveals.

That sense of the unknown links with her sometimes adventuresome spirit, and slightly unpredictable activities. She cites dog sledding and jumping from an airplane as two examples of "interesting activities I didn't want to miss." For the most part, however, Ann's' behavior is predictable and very stable. Referring back to her career development, she says she knows that most people end up with four to six different careers over a lifetime. "I'm still on my first one!" she exclaims.

I do not know for certain how much repetition there was in Ann's position as a bank president, but there had to be a fair amount. I do not think that by nature she would enjoy this. Through our conversations I learned that the rapid, and ongoing changes in the banking industry over the last 25 years, coupled with her increasing responsibilities, provided an

uncertain environment that was actually to her liking. Ann never talked about her accomplishments in the workplace, not once. She never showed me anything that added credibility to her position. She seemed to simply be herself. I wonder if this isn't what others who worked with her saw as well. I believe that Ann's strength in the workplace was likely her relationship skills and her abilities to steadfastly work with and through people in a pleasing, cooperative way to get things done. I doubt if she had many enemies.

Despite this steady nature, I wonder if Ann's thinking occurs in a circular fashion. It seems like she combines intellectual, emotional, experiential, and other less identifiable characteristics in her way of thinking and working. She may produce work in a predictable pattern, but her methods for thinking, contemplating, and questioning are dynamic and constantly interacting. I'm not certain she could attest to this, but I noticed. She says:

> My natural style might be determined, and hard charge and all that. . . . I have to caution myself that there may be a better way. The lesson I got taught by my parents was let people be themselves, individually. And let them have their greatest strengths.

Perhaps this is what I see in her, one moment hard-charging, the next pulling back and expressing compassion and gentle respect for the differences in people around her. One thing is clear, it is her nature is to be continually interested in learning about herself, others, and the world around her.

A Woman with "Voice"

The idea of women "finding their voice" was reading I was especially interested in while spending time with Ann. My own description of "finding your voice" means the amount of comfort or discomfort you are feeling with yourself emotionally, physically, intellectually, and spiritually and then the confidence you have in sharing those feelings and thoughts with others. Cultural impact, life experiences, and developmental maturity contribute to an individual's ability to help themselves stay true to their own sense of self, or to move unintentionally away from their true self. When Ann would share experiences related to what I was learning about a woman's sense of voice, we often talked about these experiences and how we each were learning to listen to that still small voice inside. I was probably more aware than she that many of our experiences growing up were very similar. I found this both comforting and unsettling.

Ann's reflections on her childhood are completely positive. Her sense of self couldn't have been better. She was aware in Junior High of the many cruel and challenging aspects of moving through those years. But I would say that Ann did not ever completey lo2se her "voice" during those years, though she might say that it was "harder to hear." Junior High, on to High School, and the first two years of College would probably have Ann admitting that she was not as sure of herself and in tune with her own "voice" as she would become in the years that followed. She says about her last two years of college:

> I was getting more of a sense of myself and being okay that I wasn't necessarily like everyone else and that I was okay with that. I had a much greater sense of myself. I was making decisions for me, about me.

She later explained that when talking with her husband a number of years ago he said, "Why would you ever give anyone else authority or responsibility over you? Why would you let someone else define for you who you are?" She says that conversation put into words for her the experience of being responsible for her own behavior. "At the end of the day when you sit down and you look at...things and examine...inputs, it's how I choose to react." This conversation seemed to mark Ann's complete ownership of her "voice" as an adult. I'm not exactly sure at what point in time this occurred, but likely a year or two into our time together.

Ann and I also talked a lot about the influence women have made in her organization. She claims it has been the "voice" of women that have greatly influenced cultural work patterns. She explained that her observation over time has been that it has been the fullness of women's lives, with demanding schedules and multiple responsibilities, that has pushed for, and even required, a more flexible work environment. She feels that women have spoken up for their needs and organizations, like her own, have rightfully chosen to listen. The end result, she feels, has been a more people-friendly organization for men and women.

In her role as a leader in an organization, always responsible for others, she remembers when her "voice" shifted from taking care of herself to looking out for others.

> When I look at my career there's almost two even parts. . . . The first half would have been me...my focus was very, very self, very individual. . . . Then there's the management side, and that's where the divide happens. It becomes much more what you are able to accomplish through people.

A couple years into our time together the "voice" Ann began to hear was one of asking questions. The questions were about her future. She began to seriously question her future: "Is this (career) what I want to keep doing?" "How can I spend more time with the man I love?" "How can I make a real difference?" "What am I here for, really?" "How can I pass along what I've learned to others?" She explained that for both she and her husband there had been a real thoughtful time of exploration about the years ahead and their use of time. She explained further:

> I am at a crossroads. It has absolutely nothing to do with being upset with anything or out of alignment with anything. It's just really more taking a good hard look at life and saying, so what do you want to do with your life when you grow up?

Ann continued to grapple with this question, "What do I want to be when I grow up?" unbeknownst to me for some time. I took notice of her shifting identity and her continually curious nature, but she did surprise me when she confided in me that she would leave her position with Norwest/Wells Fargo a year later. Her decision to dramatically change her life and enter a new phase of learning, growing, and changing, set into motion an unplanned, yet significant research opportunity. The narrative analysis of Ann's journey of

transition, development, and learning is retold in Part II of this study. It is titled, Adult Development as Narrative: The Surprise Case Study.

THE LIFE STORY OF MERRILL OSTER

The business district in Cedar Falls, Iowa, is composed of a half dozen blocks of twisting pavement bordered by trendy new storefronts alongside decaying businesses, exciting delicatessens and popular coffee shops next to uninhabited buildings. It is an eclectic area, called the Parkade, in a university town. Depending on your vantage point, this area is either a struggling mainstreet in rural America, or a unique, downtown shopping district. Two facades bear the name Oster. The first is Oster Communications, the second is a beautiful restored playhouse, named Oster Regent Theatre. I was navigating the Parkade on my way to a first meeting with Merrill Oster. I have generally known of Oster's businesses and was aware of his impact personally and professionally in the community, but never had cause to work with him or understand his passions, personality, and priorities. I was looking forward to the opportunity he had given me to spend time with him.

Oster Communications takes up the majority of one city block on the Parkade, however, it is a humble structure. I found my way to the correct entry and slowly made my way up some ominous, creaking steps to a second floor business entry. The ceilings were low and the office site was, frankly, in need of renovation. But very quickly, I was warmly greeted and led into Merrill's office which was spacious by executive standards. It was not, however, an executive suite with a great view. I quickly admired a couple pieces of artwork on the wall, noticed a large picture of what must be his wife, took in a large wooden desk and at least two, if not three, large computer monitors. I was seated at a conference table awaiting

his entry. There really was nothing about this office setting that gave any hint of the magnitude of the organization or the entrepreneur I would meet. I was comfortable, calm, and simply enthusiastic about listening and learning.

I heard Merrill coming down the hall. He has a radio broadcaster's voice and tends to talk just a little louder than most male leaders I've been with. He would say his volume level is a result of his years of public speaking and needing to be heard in front of large groups. We engaged in polite, warm conversation very quickly. He was very gracious and had obviously set up his schedule to be uninterrupted while he was with me. Everytime we were together was in this office complex in Cedar Falls. He was dressed similarly each time: dress pants, nicely pressed long-sleeved shirt, he sometimes had on a sports coat as well. He had at least one very nice ring. He was usually tanned and appeared to be in good physical shape. Everytime we were together he was upbeat, smiling, and exuded enjoyment in his work and relationships.

Merrill Oster is a farm boy and began his career as an agricultural journalist. I grew up on a farm, my father and grandfather farmed together, and my father later began his own agri-business in our small town. My first position out of college was in agricultural public relations. I mention this because farm kids respect other farm kids. There's a bond of mutual understanding that is extended without further explanation. So when Merrill would use one of his frequent "farm" metaphors I found myself quietly amused. I think I was amused for a couple reasons. First, not all farm metaphors come across terribly professional so it startled me to observe an obviously professional businessman use "down home" turns of phrase.

But, secondly, I was amused because the metaphors he used so concisely described his ideas. For instance, on one visit while I was sitting at the conference table he was getting assistance with his computer equipment and said, "this phone cord is easier to wind than bailing wire." He often says, "When I was back on the farm" to set up an illustration. And when he was discussing a large party he and his wife had hosted at their farm, he called it a "ho-down." Because of my background, I find this kind of talk and his style to be very likable. Merrill's upbringing on an Iowa farm has everything to do with the rest of his life story.

Merrill's Foundation for Leadership

The year Merrill and I first met he mentioned that he was going to receive an award from Iowa State University for having a 100-year old farm. That award signifies a great deal of hard work on his grandfather, father, and Merrill's behalf to save and keep the family farm. "I grew up watching my Dad work as a tenant farmer until he was able to have enough money to buy his first 80 acres from my grandfather. I watched his financial struggles through the eyes of a son listening to Dad and Mom talk," Merrill recalls. With pride he goes on to explain, "When I was six years old I was turning on a hose and filling a water tank everyday. It wasn't big, but it was regular and it taught me about the regular things in life."

Merrill's childhood home was home to his great-grandmother, and later his Mom's mother. He says, "I grew up with lots of mother-types and being the oldest son, my Dad gave me a lot of responsibilities and a lot of quality common sense teaching on the farm." Merrill spoke specifically of the work ethic, value system, honesty, responsibility, and

"going the extra mile for neighbors," that he learned from his Dad. "He taught me how to get a lot of chores done in an hour's time. This served me exceedingly well in managing multiple people, multiple projects, and getting all the facts quickly to write a story," Merrill says.

When I mentioned the role his father had on his life, he said, "But my mother probably had the bigger influence." He explained that his mother had learning on her mind continually. She was a school teacher and taught Merrill to read before starting school. She taught in a one-room school house for children through 8th grade. In that setting Merrill often helped other children. "She just kept encouraging and explaining and involving me in what she was doing. She had gone to Teachers' College for two years and she was always going back for more training and bringing home more books," he says with admiration.

Merrill's earliest recollection of leadership responsibilities is in 5th or 6th grade. "My classmates voted me president two years in a row and my freshman year I was at a new school and they voted me president of the freshman class. They didn't even know me!" he laughs. The stories that Merrill told me about his early years were filled with accolades from teachers and coaches. The only story he recalled that hinted at poor decision making as a high school student was the day he led three other boys to his car to skip school. He said that was so out-of-character that the high school superintendent mentioned it at his graduation. Merrill was very active in 4-H and later received the State of Iowa Outstanding 4-H Boy award. Thinking back on his teen years he says:

> I was always on the go. I know people thought I should just slow down and focus on one thing. But that wasn't how God made me. I might do one thing

> to make them happy, then I'd go back to doing six things. It's a combination of physical energy and discipline and the ability to set priorities. You can do a lot of different things in life if you just know how to focus on getting these five things done today. . . . I've always been an achiever. I think I was probably a hyperactive kid that was properly channeled.

Like many successful leaders I have come to know as an adult, Merrill pointed out that he wasn't a "nerd." He says, "I was normal." What that goes on to mean as a college student is usually a "B" student that could have received A's if they wanted to, but chose instead to be involved in a lot of extracurricular activities and gather work experience. That is exactly Merrill's story. "I didn't have a super high IQ," he reports. "I would figure out what it would take to get a B in a class and that was good enough for me. School was incredibly easy for me," he says matter-of-factly. "I was around people that could grasp math and physics much quicker than I could, so I avoided that kind of stuff." He pointed out that he did spend a fair amount of time convincing professors that he didn't need certain classes so he could graduate early. That technique must have worked pretty well. Merrill reports completing his undergraduate degree in agricultural journalism in two years and 10 months. He completed his Master's Degree in journalism at the University of Wisconsin in nine months.

His college years at Iowa State University were filled with activities and achievements. Prior to entering Iowa State he was recruited as a high school student to be a member of Farmhouse fraternity. He explained that this fraternity attracted a lot of

leadership kids. "There was something others could see in me in a snap," he says without apology. He was president of his freshman pledge class at the fraternity, voted outstanding journalist by his peers his senior year of college and was told by the Vice President of Agriculture, "Now there's someone who's going to go someplace." In addition to his leadership success, Merrill worked 20-30 hours a week at the college radio station garnering early journalism experience. He told me he never went to the wildly popular journalism parties and was just always encouraged to use his strengths.

Part of the incentive for moving through his Master's degree so quickly was his desire to be "back home" courting his bride-to-be, who is now his wife of almost 40 years. Merrill and I didn't spend a lot of time talking about his wife, or his personal life outside work in the multiple meetings we had together. I did meet his wife when I shadowed Merrill for an entire day. I learned that he has two grown children, a son and a daughter, close in age to each other, and he now has six grandchildren. The most personal aspect of Merrill's life that we did talk a great deal about was his spiritual life. From his earliest memories, he grew up in a family where everyone was a follower of Jesus Christ, and everything about their lives on the farm, with neighbors, in the school, and at home, had to do with applying the teachings of Jesus Christ in everyday living. This foundation for Merrill's spiritual life will be discussed in a section of its own.

The Priority of Merrill's Life

There is absolutely nothing guarded, or shy, or indirect about Merrill Oster's belief system. The level of comfort he has with talking about his spiritual value system, life on earth, and life in eternity, is the undeniable major thread in the fabric of this man. The first time I met with Merrill he weaved his belief system into our initial conversation. I was, I admit, surprised. It is important to note, however, that Merrill talks about his spiritual life with as much, if not more, enthusiasm than he talks about his business opportunities. He is unapologetic about his beliefs. I knew that Merrill was a man of Christian conviction when I asked him to participate in this study. He knew that I wanted to hear about the integration of his faith with the wholeness of his life. I am certain that the warmth I had to this topic, however, did nothing to increase the amount of enthusiasm he had. I am absolutely certain he is the same with everyone he works alongside.

The thought that Merrill so easily shares his Christian belief system with others, may seem offensive to consider. However, after repeated visits with Merrill, listening to him share his faith with me, watching him integrate his beliefs into everyday working conversations, and reading about his convictions in multiple publications he's authored, I've drawn two conclusions. First, Merrill is respectful. He does not push someone to believe what he believes, but he feels unabashed enthusiasm for the spiritual significance of his own experiences and he wants others to experience the same joy in living eternally that he has come to know. Second, Merrill is a very charismatic person. Individuals are drawn to him.

Many have chosen to work alongside him, and many others seek him out. He has many very appealing qualities and he is authentic. This authenticity revealed more of his character.

> I'm not perfect. It's Jesus who was perfect. I don't ever want to make people think, man, Merrill's had a sterling clean life. That's not the case. I'm a man that's been forgiven and I have had to use some of my experiences to help others through tough times. I'm not perfect.

During the hours we spent together I noted several tough times in Merrill's life. He experienced loneliness in college and fraternity brothers that rebuffed him for his strong spiritual beliefs; the birth of his first child was cause for getting serious about his faith life with his wife. He said that watching his Dad die at 53 was very difficult. "I saw that this faith stuff really works, but I wasn't mature enough then to know that I could show my weak side," he recalls. Both Merrill and a close business associate that I interviewed referenced dark, difficult days in the mid-1980s when the financial viability of the Oster companies was brought to its knees. The leadership team met at Merrill's home discussing bankruptcy options and plans for survival. The business associate told me, "I'll never forget what Merrill said that night. He said, 'If there is any way I can save the jobs of people I want to do it. I don't care what happens to me personally.'" The associate told me, "In times like that you see what people are really made of; I felt like I had seen into his soul."

The soul of Merrill Oster's worldview was constructed alongside his earliest recollections of growing up. He has always seen the world as a spiritual place, versus a place where you add church to your life. He says it's natural to him because it was natural to the

people he loved. "I watched my grandmothers and my parents depend on God completely. I've never known any other way," he describes. "My Grandmother Carrie was the most influential in my love for Christ because of how she lived."

Grandma Carrie was Merrill's second mother. She lived in his home with his family and Merrill described her as the Prime Minister of their family kitchen. "She could serve up chocolate chip cookies and Christ in one sitting!" Over the decades he learned from her life how deep conviction for the Lord merged with joy in serving others. He said she drew attention not to herself but to her faith. I see that in my conversations with Merrill. He is an attention-getter by his very style, but when he talks about his faith, he is not talking about any heroic abilities of his own, he's preaching what he's come to learn, memorize, and understand from the bible. He will lace his own experiences into the story, just like a good preacher, but the story is about Jesus Christ, not about Merrill Oster.

The convictions Merrill has for the Lord began when he was young but his enthusiasm in sharing his faith with others began when he was 13. He recalls it very specifically and always includes it in the story of his life.

> At 2 a.m. on September 18, 1953, a serious wind storm was brewing. Knowing I wasn't prepared to die, it didn't take much of a wind to send me to the cellar. The rest of the family joined me under the steps--except Dad, who watched the story from the kitchen window. I was sitting on a 5-gallon bucket. Grandma Carrie was on a chair beside me. Grandma quoted Acts 16:31, "Believe on the Lord Jesus Christ and thou shalt be saved." At that

> very moment the simplicity of the Gospel message struck me with new impact. I just believed it. It was no great emotional experience, just simple belief in Christ's finished work at the cross as the complete payment for my sin. I accepted the gift of eternal life. That night under the basement steps, I joined a long line of Christians who have passed this message from one generation to another since the time of Christ. I became a new Christian. I dashed up the steps and told Dad. The storm subsided and we returned to our beds. The next day I began telling my friends at school.

I think Merrill Oster has been telling people about his faith since that very day just like he says. During the multiple hours we were together he would often digress into a story about someone who stopped by his office to talk about their faith; or a Jewish colleague that worked alongside him for years and the respect they had for each other; business associates that weren't warm to his faith, but later would seek him out, telling him about the changes in their lives. These stories of lives changing seem to be the highest priority in Merrill's life. Watching from the outside, his business acumen and success might blur this view, but once alongside him, it is this passionate faith that matters most in his life.

Over the years Oster's business have employed as many as 500-600 people. He pointed out that there's not a single person who has ever worked for him that doesn't know he's a Christian. "I don't go down the halls preaching, but in one way or another it comes through," he says with confidence. When it comes to interviewing and seeking colleagues to

work closely with him in leadership positions he says he has always been straight with people. He explains:

> I tell them, you need to know what you're getting involved with here. I make my decisions based on the Judeo-Christian ethic. I'm a born again Christian. I won't preach it to you in the hallway, but because of that we've got a culture around here. It is absolutely inappropriate to use the name of God or Jesus Christ in a vain way. . . . If you have any problem with that, you're interviewing for the job, so now would be the time to tell me.

Working in business with a faith like the one I've described here is not without its struggles. Merrill acknowledges that as a business person it is always a struggle to integrate faith and work. "I don't know of too many Christian men working outside the ministry, that could say they have this faith-at-work struggle all figured out," admits Merrill. To train for his life of faith, he says he begins each day with quiet prayer, bible reading, or devotional reading. He also talked about meeting regularly with other men of faith to hold each other accountable to the ideals they hope to live by, and to work through the challenges of a demanding business culture. In this demanding business environment, Merrill has experienced much success, which is the topic of the final portion of his life story.

Business Success

"I remember telling my father-in-law right after I married his daughter that my goal in life was to be the best agricultural journalist in America," Merrill tells me and laughs a little.

He continues, "The jury will always be out on that, but I made a good run at it." I am not really in a position to assess whether or not Merrill hit his goal or not, but there does seem to be ample evidence that he's making a "good run at it." He is a recent recipient of the highest award given to an Iowa State University alumnus in journalism.

Merrill's professional career began while working on his Master's Degree at the University of Wisconsin in Madison and also working for the American Society of Agronomy. Through connections there he landed a position in Woodstock, Illinois, working for a man with a reputation as a very successful agricultural journalist, but an absolute nightmare to work for. Merrill thought that challenge would be perfect. With humility aside he reported to me, "My ability to write and speak is such a natural gift that I could do stuff so fast that men 10 years my senior couldn't figure out what this kid from Iowa was doing." Through this work he had an assignment to select and interview the top dozen farmers in the nation. And this is when Merrill Oster began to cast a vision for his own business career:

> That put me in touch with the cream of the crop leaders and all of a sudden the scales came off my little farm-boy eyes and I had a whole new mind set. I saw these guys as big businessmen in agriculture. Men who managed people and men who managed money. They were masters of technology. They had skills I had not been taught. . . . This was the next phase of agriculture . . . bringing principles from business that would make agriculture more successful. I thought, that's my passion. I can do that personally, but I can also teach other people.

And Merrill began developing his passion. He bought a farming operation back in Iowa. He continued his job in Illinois helping develop a newsletter to farmers, but after becoming frustrated with that company's ability to share his vision, he moved his wife and two children back to Iowa and started his own freelance business selling contracted story ideas to agri-businesses. After a couple years and momentum building, he had a vision for taking his ideas to the top farmers in America and calling it "Professional Farmers of America. That organization was a subscription-based business targeted at farmers to provide them with first-class, timely business news. Today this business is owned by Farm Journal and provides similar information and educational services to the nation's leading agribusinesses.

Professional Farmers of America gave Merrill a financial base to move away from agriculture into the broader commodities market. Today his companies transmit real-time data and news to people who trade commodity futures all over the world. He calls it a "nice niche market." His companies today are FutureSource and Futures World News which provide on-line futures prices, news and analysis to 100,000 customers worldwide. His company has other offices in Kansas City, Chicago, New York, Washington, DC, San Francisco, Ft. Lauderdale, Houston, and London. He reflects on his business journey:

> Over time I built things up and when they had pretty much served my needs for where we were going, I sold them off to use the cash to build something else. . . . But it's always fit within the goals and vision that I had for where I wanted to be when I was 16 or 17 years old sitting back on a tractor. . . . My attitude is as soon as I get something going that is successful, the greatest

> tribute to my leadership ability is to find somebody that I can quickly train up and they, too, can have a successful career, freeing me up to build something new.

This kind of fast-paced business success put Merrill in front of a lot of audiences over the years. He was involved in a many educational programs sharing what the was learning to help other farmers, and also other public platforms as a businessman. He admits:

> Entrepreneurs have pretty big egos, and I'm no exception. I mean, you have to have confidence in yourself and that is viewed by other people as being egocentric. To me it's just I know what the heck I'm doing. I'm not out there beating my own chest, if you come along fine, if you don't fine. I just have confidence in knowing where I'm going.

This was the same confidence I saw in Merrill while I was with him. It was both somewhat intimidating and exciting. While business interests have driven most of his career activity, he has been involved in local community development and volunteer efforts, he has authored seven books, two of which were written for his son and daughter when they finished college. He has had over 5,000 entrepreneurs and agribusiness leaders from five countries attend seminars he has led over the years. He and his wife are heavily involved in the support of Christian missionaries around the world, usually through the organization, Campus Crusade for Christ. Today Merrill would describe himself as an international business journalist, publishing entrepreneur, author, public speaker, and philanthropist.

As I spent time with him reflecting on his career-in-progress he explained that he has actually been trying to reduce his business commitments and increase his ministry activities. He says:

> I thought I could just bolt out of business, but two things have happened, I've got businesses I can't sell and the Lord has just made it very difficult for me to walk away. I'm thinking right now it might be more influential in my ministry activities to have one foot solidly planted in the business world. I guess I've always been a full-time missionary so this doesn't really change the way I work.

Merrill Oster is definitely a full time missionary. With the same confidence he approaches his business ventures he approaches spiritual relationships with others. He wants to bring people along in their personal lives just like he wants to bring them along in business. I don't see either of these passions ever stopping this side of eternity.

THE LIFE STORY OF CELIA BURGER

There is a "sense" we get about people when we meet them; it's an initial assessment of an individual. For me, I'm assessing much more than appearance. Though appearance certainly factors into the experience, I assess their authenticity, credibility, poise, how seriously they take themselves, and what respect they may or may not have for me. All of these factors, and others, are inextricably interwoven into the entire experience. On most occasions when I meet and assess someone, I think little of the rather natural, repeated exchange of communication. However, from the very first moment I met Celia Burger I have reflected on my initial observations. Why would she treat me so specially? Doesn't she have more important things to do? How does she remain so calm? Is she always like this?

Celia suggested our first meeting take place in her home rather than her office. I was a bit more anxious about arriving in this setting. I knew that the invitation to her home was a compliment to our potential work together, but I was less familiar with working meaningfully in this climate. Following the curves in the paved road, I eventually reached her rural home. Her house sat at the top of a ridge, nestled among trees on a small culdesac. There were neighbors nearby, but the setting for her home was fairly private.

She greeted me with poise and grace, as if I were someone she knew. As I followed her into the house I remember thinking, "She's pretty relaxed . . . why am I so nervous?" She was not at all anxious, or hurried, which is more my way of being in a similar situation. She had fresh fruit, coffee, and muffins for us to share. The big windows lining the back side of

her house allowed large amounts of bright summer light to shine around us. The muffins and fruit went untouched during two hours of conversation.

Celia said graciously many times that she was honored to be asked to participate in my study. Her poise and the sense of peace around her as well as exuding from inside of her was very, very apparent. Over three years we met. We met again in her home, and I had the opportunity to shadow her for an entire day of work. In our last time together I noted to myself, "There does not seem to be any gap between Celia's self and Celia's performance in her day." I think it was this focused, aligned self that I sensed the moment I walked through her front door that I sought to understand.

Celia's Story

Celia Burger is an educator. And the story of her life is filled with her development and passion for education. I will quickly confess that I did not think that a school teacher, even a school administrator, would have the kind of leadership experiences and scope of influence that would be a rightful "fit" for this study. My introduction to Celia was by multiple individuals. She had some time ago lived and worked in the community I reside. As I shared my research interests with friends, two people mentioned Celia as an excellent leader for my study, saying her life demonstrated that which I was curious to understand. I realize now my own ignorance around my initial perceptions of educators and administrators. Suffice it to say, after spending time getting to know Celia, I have deep respect for the leadership and influence of a passionate, competent educator.

The groundwork for this leader's life was laid in the rural Midwest in a farming community with most of her relatives living in the same county. Celia spent most of her youth as an only daughter born just prior to World War II. When she was in college two sisters came into her family; one remains alive today and is a cherished part of her life. Celia's father was in merchandising, and then a farming partnership with her uncle and her grandfather. She reminisces enjoyably saying, "I remember spending a lot of time alone, but I also remember that my parents were always somewhere near." She explains further:

> We were surrounded then by lots of relatives that had land around us. So every adult knew me. My mother and I lived with my grandparents while my father was in the war, another aunt lived there, too, and there were hired men. I remember thinking back on my childhood and I think of this quiet commitment by adults to mold me, it was like a mission not to spoil me. I just had this great support system. I can remember years of listening, sitting under the tree at night. There was no television. My grandfather and grandmother were thinkers and readers. And people would come. Relatives and neighbors would drop in. They had lots of friends. So there might be 10 to 12 lawn chairs around under the cedar tree at night. And I would listen to their conversations. You know, Roosevelt and the war, politics, farming, agriculture, tilling. . . . So it set a foundation for what a community is. It set a foundation for the kind of family I would have. . . . We're all pretty ordinary

people . . . interested in life and connections to nature and what it means to be a part of receiving and giving.

Celia testifies that at that time nursing and teaching were the two careers women pursued. She said her mother and father always encouraged her to look beyond the norm, confiding, "They were pretty progressive." She said she always pictured herself practicing business, so she applied her senior year of high school to a small college for a four year, full tuition scholarship. To win the scholarship she had to clearly describe her future business career. She must have been convincing, because she was awarded the scholarship and often found herself to be the lone female in most of her business classes. It was during her junior year of college that she discovered, "This business stuff wasn't for me." She reflects, "I saw all these guys and no women in these courses (she's laughing) and I just thought, this is not how I want to spend my life . . . not with these people!"

For these and other reasons, her career direction turned. "I had fallen in love and knew that I wanted to have a different kind of control in my life. I'd always admired my mother and she was a teacher. The women in my family, many had been in education," explains Celia. So she went on to graduate as an English/Speech/Drama major with secondary and elementary school certifications. Her first teaching position was as a junior high and high school English, Speech and Drama teacher responsible for school drama productions. Her first year teaching the senior students were only four years younger than she. "It was a wonderful class and I still maintain contact with a lot of those students," she reflects. During those years she supported her husband while he went through law school. "Although I was

the breadwinner for our family . . . I could not receive the head of household stipend. And if you were pregnant you could not teach. . . . those were still the dark ages of the 60s," she admits.

When her husband graduated from law school, they moved with one small son. Her husband took a position within the banking industry. Celia took an elementary school teaching position. After the second year of teaching in that community, their second son was born premature. She chose to stay at home for a year. When it was time to return to work she couldn't leave the two little boys. Her time at home extended for 10 years.

"That was a really rich time for me and I'll never regret being home with my children," she affirms. During those 10 years she was very active in Junior League and community theater, performing in several productions, helping with costumes and serving on the Board of Directors for the community theater. During those years she and her husband had a third son and 16 months later, adopted an infant daughter. Celia mentions many, many times the richness of her friendships during the years her children were young. "I've never replaced the intimacy of those friendships," she confides.

When their youngest child was beginning school, Celia began volunteering at an innovative magnet school with 50 percent black, and 50 percent white students. They enrolled their second grade son in this magnet school and simultaneously Celia increased her volunteer hours at the school. Volunteering turned into substitute teaching, and four years after the school opened, a classroom teacher became ill so Celia taught the remainder of that school year and was offered a teaching contract for the next year. At the time Celia returned

to teaching their youngest child was in Kindergarten and their oldest in sixth grade. She has been working as an educator full-time since.

Celia spent five years in this special school dealing with very diverse students with intense needs. From there she spent three years in a new middle school configuration as a team-teacher working to address student needs. After her third year at the middle school she was asked to apply for a consultant's position with the local Area Education Agency offering expertise to schools in the Gifted and Talented programs. During these four years she completed a Masters Degree and began work on her Ed.D. Her doctoral studies were in the area of teacher leadership. She also had the opportunity to do some adjunct teaching at the university level. She returned to the public school system as a Language Arts Curriculum Coordinator during the time she was completing her Ed.D. She worked full-time throughout her doctoral studies and on her 50th birthday she finished her doctorate. "That was quite a celebration for us as a family," she smiles. Her doctoral dissertation is titled, "The Characteristics of Elementary Teachers Perceived and Identified as Curricular Leaders."

Her career achievements quickly gave way to disappointment. She explains that for the first time in her life she began to feel suffocated within her career. "There was no place for me to go," she states. "I began to think, okay, what's next?" Celia explained to me later as we reflected on this frustrating career experience that her life at home and as a family had a wonderful network of connections and friendships; but her career frustration was throwing her out of balance. She gives her husband credit, "I guess he must know me better than I know myself, because he's always pushed me to stay in the career. He didn't want me to

drop out and go home." During this juncture in her life, her husband had a business opportunity that would move them to a new area, and she says she remembers really pushing for him to do this. They had been in the same community for 28 years. "I had this kind of double guilt because I thought he was happy where he was. If this doesn't work it's my fault!" she remembers.

On top of strongly encouraging her husband's career move, she explained that the geographical move cut her income in half. "Here you are approaching the time of your life when you should be kind of sitting back and we're going to start over!" she laughs. "But I also felt a real keen sense of adventure and freedom. I was relieved when I saw my husband's enthusiasm for a move." She confirms, "I just can't tell you how stifled and smothered I was. I felt some bitterness and I thought, 'I don't want to live this way. I just can't.'"

Her husband moved into an apartment two hours away. For more than six months they saw each other on weekends and began to build their lives in a new community. After more interviews than she can count, Celia joined her husband, and accepted a position with a small educational assessment firm and served as the managing editor of publications. She describes her two years working for this delightful, past-paced male entrepreneur as "a healing, crazy interlude" that was "hard to leave."

With a network of new contacts in place, many who were women, she received a call from the public school district inviting her to interview for an associate principal's opening in a large high school. "I did miss the life of the school . . . he wanted me to stay . . . but it wasn't a matter of what it would take for me to stay, it was a matter of where I just had to

go," states Celia. She clearly felt "called" back to education. She recalls two great years at the high school, before opportunity was waiting again.

A new elementary school was being built by the district and she surmises, "What a wonderful opportunity to build a learning community." She applied and was selected as the new school's principal. At this career turn, Celia was able to really bring together what she had garnered from her research, as well as her career, about good practices in learning communities. She said that she was enjoying then, and to this day as well, being "embraced" by the community and the educational system; the exact counter to her experiences of feeling stifled and feeling like she had no place to go earlier in her career.

Given this opportunity to start a new school from scratch, Celia multiplied her efforts. The late Ernst L. Boyer, noted educator and President of The Carnegie Foundation for the Advancement of Teaching, was publishing the Basic School Report. Celia had heard that as a follow-up to that report Boyer was looking for schools interested in working closely with him to implement the framework he recommended in the Carnegie Report. He wanted to work closely with a handful of carefully selected schools to see if his recommendations would really work. As another example of Celia's initiative, with the school superintendent's support, she single handily pursued affiliation with Boyer and his emerging Basic School Network. The application alone was over 10 pages long. Burger's new school was ultimately selected as one of the original twelve schools in the nation to work closely with this renowned scholar up until the time of his death. "We were in his home three days before he died," Celia reflects.

To briefly explain, the Basic School Network offers a flexible framework for school improvement rather than a prescription. The framework is built around four research-based priorities for renewal. Those four priorities are: community building, curriculum with coherence, a climate for learning, and commitment to character development. The Basic School Network is not a philosophy of discipline, it is a non-profit membership organization committed to excellence in education with a special emphasis on the early years of learning. Celia worked closely with Boyer for two years, she also served as the national chairperson for the committee that oversees this national network.

Prior to opening the new elementary school, Celia was able to hire her own team of teachers that would support the Basic School framework. She talked to any community group that would listen to her, casting a vision for a school that was different than existing models. She embraced change as an opportunity to educate the community. During the first six years the school was open, Celia and her staff hosted over 2,000 visitors at Irving-Weber Elementary in Iowa City. Curiosity and intrigue with the Basic School Concept was gaining momentum across the nation. Celia's role has been at the national, state, and local levels promoting and training others in the Basic School framework and enlarging the network of participating schools.

I spent a day with Celia Burger in her school. I have children in public schools. I work as a professional creating work environments conducive for learning. Celia Burger's school is everything she strives for it to be. It is a learning community filled with excellent, hard-working teachers, diverse students, supportive parents, and a carefully defined and

implemented fabric and vision for success. The school Celia leads, along with the national work she coordinates, could certainly be the pinnacle of her career, but she doesn't talk about pinnacles, or career markers, or any goals she has set for herself before retiring. In fact, I got the impression Celia dislikes discussions about retirement. I also got a sense that it was an unmentionable topic with colleagues. She admits that she and her husband discuss how they would like to reshape what they do, spending more time together and with their children, but they also want to engage in "purposeful, meaningful work." My observations about how Celia will choose to adapt her career and life next leaves me with a similar "sense" as the first day we met. Her decisions will not be hurried. They will be the right decisions, made at the right time, for the community and people she serves. She will adapt when she feels "called" to do so.

Celia's other primary strength as a leader is clearly her contribution as a visionary to an organization and to its people. Celia humbly explains:

> I have always seen a broad picture. I don't know if there is any connection. . . but I was raised to think beyond myself. . . . I just always knew that life was so much bigger than this time and moment. . . . So I think I've always enjoyed finding the next step and where that leads and planning a bigger picture to get there.

Celia's Way of Being

I think Celia Burger sees her life as a work of art that she is crafting. She quotes Ernst Boyer who said, "We strive to build our lives as though they were works of art." And she adds, "That is my goal." Celia acknowledges that she has a synergistic affect on the people and things she touches, but she's not looking for accolades. She's driven with purpose. Perhaps this viewpoint is achieved because she can look back over her life and see what she has created. However, in coming to know Celia I got the sense that she has always experienced a sense of "calling" to that which she "had" to do and the life she was "called" to lead.

Spending time with Celia and then watching her work is a little like moving up and down a continuum of energy. When she's working she functions almost all of the time at a frantic, wild pace. She would tell you she always, always has unfinished, loose ends hanging about her work and in her mind. However, when you are in a conversation with her one-on-one she has this wonderful ability to slide down the continuum into a thoughtful, deliberate, peaceful, connected conversation. She gives you her full, undivided attention and is always encouraging. She had this effect on me each time we were together, offering me encouragement in my own research, telling me she was proud of me and that I was doing so well. I always left her feeling like I could do anything! What a wonderful gift of leadership.

When I asked her about this continuum of energy she laughed! The fact is she tries to manage as much as she possibly can all the time. It appears this is a way of life. She pointed out that the "art of scheduling" is important to her and that she tries to build a schedule that

allows her margin in her days. Regarding her focused attention to individuals, she simply repeats something I heard more than once, "I am practiced and deliberate. I always have been committed to peace," she reflects.

Celia demonstrates this way of being as an example of living a principled life. "We need to take that moment each day to rejoice and be glad in this day," she smiles. Very young in her career she began to articulate the principles for which she believed, like being the person who speaks for justice; speaking up when we know something is wrong; and advocating for children and families who are in need. She also has a strong commitment to helping women meet their personal goals and untapped gifts and rights.

Her love of theater, reading, and drama permeate her being. She is artistic, aesthetic, a good writer, and a good editor. She enjoys nature and acknowledges its contributions to her every moment. She savors good friendships. Her own family is her highest priority and time together as a family her greatest joy. She says about her role within the family:

> I think I've always known that they will go on with their lives and if I don't build my life and follow it. . . I have to have it. . . . It's a part of who I am . . . there would be nothing. I would be clinging to them.

Celia's endurance and character has also been tested when she was faced with a life threatening disease. Shortly after Irving-Weber Elementary school opened, Celia said she had been incredibly fatigued. During a routine mammogram she discovered a breast malignancy. She had a summer surgery and returned back to school in the fall completing her radiation treatments. She has passed over her fifth year without a recurrence of the cancer. "You kind

of always look over your shoulder and hold your breath. I have many days now that I will go without thinking about it. . . .I'm just very, very fortunate, " she testifies.

Success on Her Own Terms

Success for this educator has really always been on her own terms. Looking back there is a story, a path of career advancement that follows a developmental course. But make no mistake, Celia chose her own path, and created her own future, many times. The experiences that particularly impacted her life as an educator helped her to define her own success. Exposing these stories supports her development as a teacher, a mother, a community volunteer, and most formidably, as a leader. The first two years of teaching she received valuable mentoring. She explains:

> Not only was I forming a marriage and beginning the foundation for our family, but I also worked on a foundation for my teaching. I had two wonderful older teachers who just literally got on each side of me and were the wind beneath my wings. I know they were fearful because the person who had preceded me had bombed. So they weren't going to let that happen in their school again. But they also made me feel very special. They really nurtured me, and honored what they saw as my talents. They made me feel like a peer at the same time. They had the real gift of mentoring. . . . We loved them.

The support these two teachers gave Celia, identifying her unique giftedness as a young teacher, is something that Celia has learned herself. She often refers to student or

faculty development by saying comments like, "Let's look at what we have to work with," or "what we can build on." She consistently seeks positive behavior and builds upon success.

When Celia was team-teaching in the innovative magnet school which was 50 percent white, and 50 percent black students, she says, "I thought I was a good teacher, but I also discovered I had a lot to learn." She explained that the students had such diverse needs, from one being fearful about a neighbor down the street, to another just needing to be hugged. These were not common concerns for Celia and her family. She quickly had to learn how to adapt to meet the needs. She remembers other teachers trickling into her office after the first week, sitting down and asking, "How are you doing?" She says those same nights she was "going home every night and crying because I just couldn't meet the needs. It was so draining," she recalls. "There's a knothole that you go through . . . . That has helped me in working with other teachers, students and children." Celia uses her own experiences and empathy to build others up as her mentors and older teachers guided her.

Celia's years working with the Area Education Agency afforded her the opportunity to work with a variety of schools and a variety of educators. She began to question and refine her theories around how you create change. These questions led her back into the classroom as a student pursuing her own research contributions. She was specifically interested in the characteristics of teachers that influence other teachers and make change happen. Celia is constantly thinking about creating change--positive change in the lives of students and staff, and positive change in the structure of educational systems. She is most successful as a facilitator, carefully, gently, processing conversations and moving policies forward. She

admits that since she was a teenager, she's always been selected from among her peers for leadership positions, "I just got picked." And she still does.

Celia Burger did not chart a career that was about positions. If she had, she would have been a school superintendent a long time ago. "I was always interested in change and how adults learn, as well as how children learn," she advocates.

> That's what I focused on....how we look at how children learn and how to optimize their growth. Not academically alone, but in all ways of their lives to help them become adult learners. And the same with adults. So that's been my life. And the chapters have been played out in various ways.

Since completing my time with Celia, she has since resigned her position at Irving-Weber Elementary School and is in another challenging career working for Breakthrough to Literacy, a division of McGraw-Hill Publishing, as Director of Curriculum. In this leadership position she is focusing on solutions for early literacy development. Our brief telephone calls and email messages have clearly suggested to me that the pace of her life and her energy is still quite fast. She would likely tell me, "It's going to get better. I'm going to be letting go of some responsibilities; I'm going to be finishing some commitments." But I have been around her long enough to know that finishing up one thing just opens her up for other principled, purposeful opportunities. Celia is still creating the artwork of her life.

COMMON THEMES - UNIQUE ART

The life stories I have retold about the three leaders in this study, Ann Wagner-Hauser, Merrill Oster, and Celia Burger, are uniquely their own, as they should be. Ann's career for over 20 years was in banking, Merrill's entrepreneurial career is based in agricultural journalism, and Celia's career has primarily been in elementary and secondary education. Their career paths are about as different as you can find. However, in our society we often want the 30-second sound bite, or the headline news, or a book review, so as to quickly gather a grasp on information. Over the years as I gathered my fieldwork, I experienced a similar phenomenon. I would be asked, "So what are you learning from the leaders?" This seemed to imply that I could synthesize some kind of brief synopsis about the lives of three uniquely individual, intriguing people. My initial instinct was to shy away from a simplistic synthesis of three unique lives. Having said that, I did discover several qualities, or experiences common to the three leaders that seemed to contribute to their lives of successful leadership. I call this section, "Common Themes - Unique Art" as a reflection of my respect for the delicate nature of discussing three lives as if they were one.

It is beyond the scope of this study to offer in-depth theoretical analysis of my observations. My intent here is to highlight four common experiences, or qualities, the leaders shared. Those were in the (a) the leaders' families of origin, (b) the unconditional support and mentoring they received, (c) their experiences in conversation and debate, and (d) their sense of risk and adventure.

Families of Origin

All three leaders grew up within in-tact two-parent families. Their homes were loving, nurturing and safe. Daloz et al. (1996) in their study of the lives of committed adults also found that the majority of the adults in their study came from what they call "a loving home" (p. 17). No one could argue that a loving home is a desirable experience for a healthy life. Each of the three leaders talked a great deal about both their mother and their father. It was clear to me that they had been nurtured and taught many good things by loving parents who were with them while they were growing up. I did notice when each leader spoke with pride of their father, they would cite his specific achievements. When they spoke of their mothers, they would speak of the influence their mothers' lives had on them. They would talk about the manner in which their mothers lived their whole lives, always teaching and involving them in activities and experiences that would help them become good citizens. It was more uncommon for these leaders to describe a specific experience they remembered with their mothers, and more common for them to talk about the "way she lived her life." The solid families of origin contributed to the leaders self awareness and positive stories about themselves as described in the next quality I noticed.

Support and Mentoring

Each of the leaders told stories about themselves from the time they were very young that were positive. McAdam's (1996) describes the quality of this kind of talk, a "narrative tone" (p. 39). He says that as young people we each adopt a narrative tone that is either

positive or negative. Our families of origin have a great deal to do with setting our narrative tone. Given that these leaders grew up in healthy family environments, the narrative tones in their stories were positive. These leaders grew up parents, and their extended families, often grandparents, aunts, uncles, and neighbors, telling them that they could do anything they wanted. These leaders never felt when they were young that they had any limits on what was possible for their lives. They adopted this sense of limitless capacity and have maintained it for a lifetime.

Each of the leaders also told me specific stories about early mentoring relationships when they were beginning their careers. Celia Burger talks about two more mature teachers in the first school where she taught fresh out of college, who "took her under their wings" and "did not let me to fail." She said they were precious to her and stood by her very closely to assure that she would succeed. Merrill Oster told me about a couple that took him and his wife "under their wing" in the church where they worshiped early in their marriage. Merrill was beginning his career and this couple kept giving him books to read and encouraged him in his faith and career. Merrill also discussed on different occasions his desire to align himself with individuals who were at least 10, if not 20 years, his senior. He said, "They've already done what I'm doing. I'm not intimidated by them, I want to learn what they know." And Ann Wagner-Hauser speaks with great admiration about a woman in her first banking position that included her in everything she was doing. "She taught me by including me in everything," Ann said. Mentoring is a topic discussed within many disciplines and its

attributes are not questionable. Suffice it to say here, that these leaders also had this supportive experience and recall the impact it had on their lives.

Conversation and Debate

Each of these leaders fondly recalled stories from their childhood where they were routinely involved in meaningful conversation with the network of adults in their lives. Their recollections are that the conversation was of debate quality with opposing ideas about issues of the day being at the forefront. I listened as Ann Wagner-Hauser described meal time as a time of open debate and discussion. I imagine her seated with her family of six around the dinner table and an open exchange on many viewpoints and topics were shared. I believe she refined her own sense of voice and confidence in this setting. Merrill Oster talks about the church meetings he attended, the revivals, and the good preaching he listened to since he was a very young child. "I listened to my grandmother talk about the families and the concerns they were faced with," recalls Oster. I got the sense that Merrill was always in the same room or close-by for all the family's conversation and debate. For Celia Burger the setting she recalls is outside around a tree with neighbors and adults bringing their own lawn chairs. She recalls discussions of politics, religion, and the war. She felt very much included in those gatherings and it shaped her view of herself as a part of a larger world.

In Daloz et al. (1996) they discuss a changing landscape in our world from what I heard Wagner-Hauser, Oster, and Burger describe. In the stories the leaders in this study shared with me they were in some sort of initmate family space or place, or they were getting

together with others in a public place for the purposes of sharing conversation. Daloz et al. describe this place as a "commons" and said it may be:

> The town hall, general store, church, or a flock of households. . . . Whatever its form, the commons marked the center of a shared world. . . . By happenstance and intention, people met and talked together with some sense of a shared stake, something in common. (p. 2)

These authors point out that this landscape for connection and sharing has changed. They refer to this phenomenon as "the new commons" (p. 2-3). They explain that the new commons could still be in an extended family, but it is more likely to be in an office building break room or elevator, a video arcade, at the mall, viewing a TV screen, and even more anonymously, over the Internet. This concept of a new commons was unsettling as I read Common Fire (Daloz et al., 1996). Now, as I see the stark differerence between the commons the leaders describe, and the new commons Daloz et al. describe, I am left to question how we can create conversation and debate in our lives and the lives of our children in a way that replicates the positive experiences in the leaders' stories.

Risk and Adventure

In the introductory chapter of this study I discussed the workplace identity research of Riverin-Simard (1988). Her research found that over the life course 85% of all working adults develop a pattern of workplace identity that fits what she calls the "biological" model of development. In this model adults see their workplace engagement as a sort of growth-

plateau-decline pattern. The remaining 15% of the working adults, named "exceptionals," see their workplace identity as always growing and every experience as a good one. They see themselves as the author and director of their futures and they hold no paternalistic images of the organizations they work within. In this model of work place identity, the "exceptionals" often display a sense of adventure in their careers and exercise a fair amount of risk in their career decision-making. That is exactly what I saw in each of these leaders. I knew that they were "exceptionals" as Riverin-Simard defines for many reasons, but risk and adventure were noticable in each of the leaders.

Celia Burger more than once left secure professional positions for the adventure of a new position. She and her husband left a community network of family and friends that they had been in for 28 years to start over. This was full of risk. Ann Wagner-Hauser determined during the final year we were working together that she was no longer going to work for a large corporation. She did not know what her next career move would be, and she was willing to risk changing her personal and professional identity for the unknown. Merrill Oster's business risk and adventure has really become a way of life. His colleagues told me more than once that he moves fast and assumes a great deal of risk. As I listened to these stories and now confirm the common theme among them, I also recognize that these leaders embrace risk and adventure and enjoy the unknown. They would likely recount each of these and other similar experiences as exciting.

The common themes of strong families of origin, unconditional support and mentoring, conversation and debate, and experiences of risk and adventure combine to shape

the lives of the three leaders in this study. I do not know if I would find the same qualities in other leaders, but I find myself cognizant and intrigued that these common themes were present.

PART II

NARRATIVE INTERPRETATION

UNDERSTANDING LEADERS' LIVES: MOVING FROM THE GOAL OF BALANCE TO A PARADIGM OF RHYTHM

Introduction

The elites in this study were selected because other people saw them as leaders living meaningful, purposeful, even balanced lives. At the time this research began the responsibilities in my personal life were multiplying: small children, the demands of a professional spouse's career, community efforts, personal development, love and care for my extended family. My career was also growing and opportunities for meaningful work were exciting in my professional life. It is no secret then, that my curiosities around the way these leaders were living their lives was a direct result of my own questions and concerns about the tension between adults' personal and professional lives. The opportunity to further analyze how these leaders balanced their lives and sought to manage their personal and professional interests, presented itself as they shared their life stories with me.

As a result of the life stories presented in Part I of this research study, I began to analyze the leaders' narratives around the pace of their lives, their work and personal identities, and their desire to live with commitment and purpose. I also began to question my understandings of living a "balanced" life. Why does it appear that wholeness and balance in adult life is better talked about than actually lived? Why do so many leaders seem to be racing toward distracted, unfocused destinations? What made the leaders in this study look

different to the individuals that recommended them to me? Are the leaders that participated in this study actually balanced?

In this chapter I will provide a brief overview of balance and my belief that adults consider balance either as a result of pain or privilege. In this overview I will also introduce the three different time frames each of these leaders had for their thoughts on balance when we began. With that as a foundation for the topic, I will present a narrative analysis of three themes that presented themselves in the leaders' life stories, and specifically our discussions around their lives of leadership and balance. Those themes are (a) the pace of leaders' lives, (b) work and personal identities, are they integrated, divided, or shifting, and (c) living life with commitment and purpose. I will conclude this interpretative chapter with a reconceptualization for the notion of balance in adult living, and recommend movement away from the goal of balance to a paradigm of rhythm in life.

An Overview of Balance

Over the months and years that I have researched and reported on my learnings around the topic of balance I have more than once pulled up short with the thought, "do all people consider balancing as passionately as I do?" My own answer to that question is, "probably not." The stress and pressure to make a living in today's society creates demands on individuals such that they are most concerned about making it through to the day's end versus questioning if they have done that in a "balanced way." The cost of living, child care

needs, health and safety issues, care for older adults, transportation, food, and clothing contribute to a few of the baseline needs of many adults.

Schor (1992) and Swenson (1992, 1998) both point out that even middle-class America is not fully aroused by the topic of balancing life. In mid-range socio-economic levels, individuals strive to work with success, provide comfortable housing, food, and clothing for their families, taxi their children to multiple extra-curricular activities, attend spiritual activities, and take care of their physical, mental, and emotional needs. They may even have the financial means to hire others to help them with day-to-day responsibilities. But individuals can do all this without cognitively investigating the concept of balancing one's life. To these individuals, balance is not necessarily a requirement for successful living, or a caveat for prescribed success. Therefore, from my experience with the topic of balance, it appears that an individual's "ability," defined by Bolander et al. (1993) as "skill or power in sufficient quantity," to discover or choose balance in their lives is a by-product of one of two things: pain or privilege. I believe pain is the easiest to understand.

Pain

To come to the issue of balance by way of pain is unplanned and often leads to life transitions and new learning (Hudson, 1999; Merriam & Caffarella, 1999; Merriam & Clark, 1991; Peters & Jarvis, 1991; Sheehy, 1995). A life event such as divorce, the birth of a child, the death of a parent, a health crisis, or a sudden career change, may lead an individual into unexpected reflection and adjustment (Argyris, 1993; Brookfield, 1987; Mezirow, 1991).

The pain of this adjustment leads the individual into a period of reflection and self assessment that may result in an increased period of questioning.

Merriam and Clark (1991) quote Aslanian and Brickell's 1980 study that cited "83% of all adult learning could be attributed to coping with a life transition; of which 72% of these transitions had to do with work or family" (p. 45). These transitions will likely be related to changing priorities in their balance of time at work, as compared to time with family and friends, questions of a spiritual nature, and renewed interest in taking better care of their mental and physical health. Though the end result may yield a "more balanced life," the starting point was painful. It is also possible that the underlying assumptions (Mezirow, 1991) or reasons, for an individual's life adjustments are difficult to detect without repeated probing and discussion (Brookfield, 1987, 2000). In other words, an individual may not volunteer their reasons for a changing lifestyle without inquiry, again, because of the original pain of the unplanned life event.

Privilege

In my opinion, to become interested in the issue of balance by way of privilege is likely the by-product of one of three things: advanced education, financial resources, or spiritual maturity. Even then, these three combined possibilities encompass a very small percentage of individuals interested in the topic and is more difficult to substantiate than discovering the topic of balance as a result of pain. Ryff (1995) in her research around what it means to be psychologically well, admits that her work "may be seen as fanciful frosting on

the cake, a luxury agenda likely to be about elite samples of privileged lives" (p. 103). Ryff's research focuses on adult well being. She was responding to possible criticisms for focusing on adults that are psychological well, versus the more common focus on adults that are psychologically "sick."

The first suggestion, an advanced education, means an individual has had the privilege of discovering and studying the deeper issues of life and may be more enlightened to the balance of work and family, as well as the balance of spirit, mind, and body in the life course. I confess it is easy to think of individual exceptions to this claim, however. Second, the availability of financial resources also does not guarantee an interest in the topic of balance; however, it may provide the financial means for hiring help to assist an individual or a family in completing tasks and responsibilities. For example, child care, house cleaning, repair and maintenance of automobiles and recreational equipment, yard work and investment oversight are services that when performed by others, could provide increased discretionary time for an individual or family. Leveraging these tasks to others may create time to consider, or reconsider, the gift of time and the issue of balance in a life or family. And third, many spiritual belief systems support a balanced, and purposeful approach to living. Hence, my claim that spiritual maturity may result in actions that guide an individual's use of their time over the life course. More research would be necessary to support my claims of coming to this topic of balancing adult life by way of the privilege or pain, but these paths have become the most plausible to me.

Time Frames

I have for many years approached the notion of living a balanced life as my ability, or failure, to exercise control over my own schedule, and my schedule was made up of days. Over the years I pursued excellence in time management skills, with measured success, and I could feel myself becoming more efficient at working harder, smarter, and faster. The way that I could measure the fact that I was working harder, smarter, and faster was in the evidence inside my daily planner. If I had increased the white space in my daily planner, filling those white spaces with more of the important, passionate activities that I cared most about, I believed I had been successful in balancing my life. Given this frame of reference, the time frame I was using for the notion of living a balanced life, was a 24 hour day.

Virginia Bass (2000) in her text, Receiving the Day, makes a poignant observation related to my own ideas about white space. She said that in her home town, all fourth grade children "are required to buy date books . . . like the ones business executives often carry" (p. 1). Her concern with this behavior is that after three decades of keeping her own date book she's suspicious if a daily planner conveys the best method for approaching time. "The flat pages of a date book can become a template not simply for organizing time but also for visualizing what time is: a sequence of little boxes waiting to be filled" (p. 1). She admits that blocking out boxes for things like reading, exercise or family is a sign of wisdom within this system, but Bass suggests that white space in a daily planner is not the ultimate understanding of what it means to live a balanced life. Interestingly, the leaders in this study each had different time frames for their points of reference on a balanced life.

Ann Wagner-Hauser explains her time frame for balance as something that is held just for a moment:

> You're always trying to have things aligned. Perfect. Everything's in its place. And the moment you do, it's like . . . an adrenaline rush and you may as well capture those few seconds. . . . . It's juggling everything. . . . It's recalibrating all along the way . . . you get those moments when the day has clicked.

I understand the moments in time Ann is referring to, the moments and minutes, and sometimes if your lucky, an hour, when your spirit and your hard work come together in an exciting contribution to an organization or people. There is a rush of excitement in knowing that your hard work and wisdom are making a contribution to others. But as Ann describes, this moment of balance is quickly lost and the day fades into another day. Merrill Oster's reference point for understanding balance is over a longer time frame:

> I don't think you can look at a day . . . I think you have to have a little safer time line. . . . You'd see me as an extremist, doing something really hard. I think when you look at your intent and then how your whole month turns out as opposed to how any given day turns out, it might be a little easier to bring things into balance.

When Merrill described his days and weeks and the focus he has in his life he seemed to completely discount the notion that something as ideal as a balanced life could be attempted in a 24 hour time frame. He shook his head side ways, acknowledging, "I don't

think you can look at a day, you'd see me as an extremist." He's saying that on any given day you would not see the full rainbow of his life; you would just see him working, or hunting, or speaking to a large group, or traveling between destinations, or meeting with a powerful board. Perhaps if you looked at a month, he's suggesting, comparing the intent of his month with the results of the month, you could assess if this time frame is sufficient to assess if he is balanced.

The time frame Celia Burger employs as her frame of reference for balance is even longer. When I asked her, "How do you think about balancing?" She quickly, yet thoughtfully responded, "A larger block of time--not a day." She referred to her time frame for assessing balance in her life as being through the "seasons" of her life. Celia refered to the years she stayed home with her young children, as a "season of my life." I heard her describe the season of time when she and her husband were raising their young family and networking closely with other couples in the same life stage. She also would talk about work responsibilities and commitments with a frame of reference that inferred a season of time, like several months, or maybe several years, to develop a project and get it "where she wanted it to be," implying that then she would pass on to a new season; one season not necessarily better than the other, just new.

Once I heard these alternative time frames on the notion of balance in the voices of each leader, I began to reassess my own thinking about balance. These images of balance were different than my own. I must confess, I once believed I understood what it meant to live a balanced life. I realize now that my time frame and reference point was narrow. I really

hadn't considered balance being about anything more than an endless series of 24 hour time frames. This learning was just the beginning of the knowledge I would recreate as a result of the narratives of these leaders.

The Pace of Leaders' Lives

The meaning of work in American society is influential. Upon first meeting an adult in this culture, we usually ask, "What do you do?" To be able to respond with some kind of occupational title, profession, or employer has a positive reflection on the individual. Coinciding with the affirming attitudes we have around work, it is generally accepted that working hard is also admirable. Over the decades, and regardless of occupation, self worth and self esteem have accompanied a pace of work that is demanding. There has certainly been many positive social side effects from this cultural pattern, but there has also been a steady increase in the expectations organizations place on individuals, and especially leaders, to keep up, or exceed the pace of work they have previously set (Rosen, 1991). The demands of an organization on the leaders at the top make balancing a life challenging at best. Each leader in this study works tirelessly and has contributed the majority of his or her waking hours to the organizations they care about.

In the often referenced study, The Overworked American, Juliet Schor (1992) reports that long hours have always been the trademark of those who earn the highest wages. But because the percentage of white collar, professional positions is increasing in our society, the percentage of individuals working longer hours has also increased. Additionally, when

organizations restructure to become "lean and mean," they transfer more responsibility to top leaders. Schor reports that among Fortune 500 companies, senior managers average 70-hour work weeks, excluding substantial time for travel. In a study analyzing work and leisure hours in America from 1970 to 1997 Jacobs and Gerson (2001) also found that during the last 25 years those with the highest levels of education are working increasingly longer hours. In addition to the increase in working hours, managing self and home are time consuming. In a USA Today (Peterson, 1989) study regarding the use of time spent on daily tasks, the researchers found after consulting a range of experts, the normal tasks necessary to maintain self and home (like getting a hair cut, commuting, grocery shopping, cooking and eating, housekeeping, taking care of pets) and work full time, requires an average of 42 hours per day versus the available 24.

Longer working hours have been documented through independent research conducted by the Economic Policy Institute (Mishel, Bernstein, & Schmitt, 2001). They concur with the increase in working hours. "Families are working more hours and feeling the 'time squeeze' more acutely than at any point in the postwar period" (p. 3). Closer analysis reveals that middle-class, married couple's family income grew 9.2% from 1989 to 1998 not because of increased salaries, but due to the family's combined increase in working hours, up the equivalent of four to six full time weeks a year since 1989. And they poignantly point out, "The increase in work hours has made the ability to balance both work and family a major challenge of family life today" (p. 24). Fraser's (2001) research of corporate work life reveals the pain this kind of overwork produces. She says, "The culture of overwork and

under-reward has exacted a painful toll not only upon the men and women employed by the United States' largest companies but upon their families, vital civic structures, and the nation's society as a whole" (p. 11).

The leaders in this study never complained about the hours they worked. They seemed much more focused on the projects they were implementing and the relationships they were building to accomplish the same. During my time with each of them I did take note that Ann Wagner-Hauser regularly worked 70-80 hour weeks for many years. She would take work home at night, over the weekend, and on vacation. Many years ago she reduced her non-stop connection to the bank during her free time, but she continued to work 10-12 hour days. Celia Burger's hours worked per day has always been high. She regularly works 12 hour days and has always had many evening commitments, and several volunteer and group commitments each month. Merrill Oster's pace of business lures him to financial markets that are open around the world around the clock. In recent years he has been allocating his energy to a variety of organizations, and increasingly to his family. It does not matter the result at the end of day, Merrill has always had boundless energy and dedicates himself completely to the tasks of the day. For these leaders, time has always been in short supply compared to the impact they are seeking to make.

Suffice it to say, the pace of all leaders' lives, and specifically the leaders in this study, is fast. The experiences I heard about from these leaders left me questioning the issue of balance in a leader's life. It left we questioning how much of the way these leaders navigate their days is a by-product of their own intense drive, and how much is a result of the

social, cultural, and organizational forces that encourage them to work harder, faster, and longer? Jill Fraser (2001) calls the overlap of work with home and home with work "job spill." The problem as she sees it is that work gets disguised as rest. For instance, working lunches, handling correspondence at home, traveling for business on the weekends, working by way of cell phones and laptops while commuting. Her term, job spill, is purposeful, like an oil spill, seeping and invading places it was not designed to reside. How much job spill have these leaders endured? Do they allow their work lives to invade their home lives?

Each of the three leaders graciously spent time with me. They rarely, if ever, broke appointments with me to spend time on other more productive activities. I never got the feeling when I was with them that they were frustrated with the demands on their lives or schedules. But I saw the demands placed on each of these leaders. I watched them interact. I noticed the respect colleagues had in their eyes when they interacted with each of them. I took note of the concise use of the leaders' time by others. I talked with colleagues to check out my own observations on each leader. I envied the circle of support staff each of them had built around them to "get work done." I noticed that this circle of support managed their schedules and to some degree, their whole lives. However, given all of these good things, the pace of these leaders lives on any given day really looked unbalanced to me. What I was observing in them was not what I expected. As the hours they worked and the scope of their leadership responsibilities became clear to me, I felt overwhelmed by what I was hearing. I entertained questions in my own mind about whether or not any of them were living life in a balanced manner.

When I press myself, I think I expected to see balanced leaders move through their days rather casually, albeit purposefully. I expected them to really look out for themselves and their own schedules. I expected them to be organized and bring tasks to completion. On all of these assumptions, that was not what I observed. All three leaders gave unselfishly of themselves all the time. These leaders did not seem to look out for themselves, they seemed to be getting work done through other people, and generously gave of their time to make that happen. All three leaders maintained a pace of activity that was not casual or peaceful or complete. In the narratives that follow, I will analyze the pace of success, the emotional demands of this pace of work, and the impact of too little time.

Pace of Success

Merrill Oster has always packed a lot in. Within his industry success is most often defined by the profitability of his efforts. Therefore hard work nets increased income. He has been an entrepreneur his entire adult life. By anyone's definition, he is hard driving, focused, aggressive, successful, and persuasive. Spending a day observing Oster at work did not leave me thinking of him as a balanced person. His intensity is obvious. The pace of his business is fast, and the pace of his mind is even faster. In an hour he might initiate uncountable ideas, requests, and demands. Every one of which was assigned to someone, or shared with his personal assistant to line up a phone call or a meeting to discuss it later. Whenever I contacted Oster to arrange an appointment I talked with his personal assistant. No matter where Oster was around the country, I usually heard back from him within a

couple hours with a specific date and time I could meet with him. He is clearly a businessman that understands how to get things done.

What I noticed in Oster's environment was a sense of urgency in every move and every decision. I felt a bit like I was part of a race. Everyone that surrounded Oster seemed to have the sole purpose of supporting him. His wife, his personal assistant, his business colleagues, the local community, and the incoming phone calls, all clearly indicated that Oster was in charge. He admitted, "I know that I'm authoritative and intimidating. That's my style. I sometimes forget that my influence exists."

During my time in Oster's organization I also interviewed one of his top colleagues. Both Oster and this colleague brought up the tension between working in business and living with integrity in their spiritual lives (Jenson, 1989; Nash, 1994). They acknowledged that the balance between successful business and honest business practices is not always clear or easy. With regard to the pace of their lives, they acknowledged, that there is rarely time to debate every decision taking place on a daily basis.

I can't be certain over time how Oster's pace of life and sense of balance compare to other organizational elites. However, Nash's (1994) work exposes the irony of what she found in the lives of 50 high level business leaders. The leaders in Nash's study were specifically chosen because of their intense faith and willingness to incorporate those beliefs into their personal lives and relationships with others, similar to Oster. A likely assumption is that these leaders would balance their work and family lives better than the norm. However, that's not what she exposed. Nash readily admits that she found tension between

the work lives and family lives of these leaders. In fact, she said that the executives offered few details on how family life, faith, and career worked together, saying the topic was uncomfortably elusive (pp. 197-220). She pointed out that in the lives of busy executives family time can be seen as "left-over" time, after everything else is completed. She says this is the most telling reality on the true balance of work and family. I didn't have the opportunity to specifically explore these questions and the fullness of Oster's family life with him. I know that his priority is his faith and his family, I don't know what that has specifically looked like on a day-to-day basis over the years.

Emotional Pace

A leader's life can also be affected by the emotional pace and organizational demands week after week. Ann Wagner-Hauser confessed to me that it is difficult to stay positive when there are increasing expectations from the organization. "As a leader," she says, "it doesn't feel very good." Her confession was that as a leader there isn't a place to go to deal with the emotional pace and expectations.

> The pace of what we do and the hours you spend doing it . . . I feel like I'm doing half a job at the things I'm doing trying to cover all the bases. I think it's a struggle to try to feel that you're doing a valuable job. You may be getting it done, but that's about the extent of it. On a scale of one to ten, it's probably a one you can "x" off the sheet, but it just doesn't feel like the quality of work you might want to put around something.

Wagner-Hauser points a finger at technology as a major contributor to the pace of the workplace. "The amount of information we have access to . . . fax it to me . . . e-mail me. . . . I wonder where we are in such a rush to get to." The notion of a round-the-clock adult electronic leash comes to mind as I listen to Ann's frustrations with all that's expected of her.

> There is just so much I can take in and so much I can respond to. There is a limit. I know that intellectually, but the tough thing is dealing with that...I'm just not sure...I know I don't have the answer. It's a struggle and you see the same pressure put on the people you work with. So how do you help them when you can't even help yourself? I think we're in a whole new world. I think we're all trying to figure out how to deal with this pace.

The questions Wagner-Hauser raises are difficult, and many leaders would not confide them. In positions of leadership they are expected to have answers, not questions. They are expected to support and encourage others. But is this realistic? How long can they endure the gut-wrenching feeling that they are not able to produce the kind of work that needs to be produced? Is suppressing these emotions what's best for the organization? The individual? Society? Author Jill Fraser (2001) has a lot to say about these emotional demands.

"Does the notion of a white-collar 'sweatshop' seem incongruous, implausible--perhaps even offensive--when linked with the image of work life within America's largest and best-respected corporations" (Fraser, 2001, p. 15)? Fraser discovered something, I too, have noticed. When talking with CEOs, management consultants, and other business leaders--like the ones in this study--they paint an optimistic, confident view of the workplace and the

future. However, just slightly below the top level opinion leaders in an organization, and even some high level leaders, will admit that all is not well in organizational life. "Juggling the intense demands of job schedules with the intense demands of a family, which may include responsibilities for aging parents, as well as spouses and children" is complex as Fraser points out (p. 21).

Fraser's research conducted over a four year period revealed the real impact of organizational policies on its employees. Those included, an insane pace of work, earning less and working more, the disappearing benefit packages, a ball-and-chain connection by way of technology from the organization to an individual's personal life, the disappearance of an organization that is designed to "take care of you," and the most difficult to see through, the corporations' motivational "spin" for working harder than ever before to battle and defeat the competition "out there." She says the corporate scenario for success often sounds like this:

> If they (our visionary corporate leaders) and we (their fortunate employees) all work as hard as we can, to the utmost of our capabilities, **every single moment of every single day** [emphasis original], we all may thrive--at least for a while--in a new economy that is difficult and demanding, but potentially rewarding. (pp. 184-185)

This type of organizational positioning is familiar to me. The sports metaphor, winning, applied over and over in a business context does look like training harder, working out longer, and doing whatever is necessary, even dropping over on the court, mat, track, or office floor, in exhaustion gazing at a picture of the people you love most. It is compelling,

but it is not what's best for society, for our communities, our organizations, or our personal lives. The pace of Ann's life, with its emotional demands, and non-stop technology interruptions, makes her life hard. The competing demands on Celia Burger's time makes her life hard as well.

Too Little Time Makes Life Hard

An interview in Celia Burger's home reveals the pace of her life. The two of us were seated on her screened-in porch on a sunny, 65 degree day. Celia had just completed her school year as principal at Weber Elementary in Iowa City, Iowa. I never saw her husband, but I believe he was in the house when I arrived. Her mother was in the other room reading the newspaper and having coffee. Nearby, carpet layers were challenged by a repeat visit for a difficult flooring problem. Celia was preparing to leave in two days to see her son's family in Iceland. And she scheduled an interview with me!

We were interrupted twice by a telephone call from a job applicant. The second time Celia answered the phone she said, "Weber Elementary," then laughed and said, "It's just crazy around here!" She then learned that an applicant she really wanted for a teaching position for the next school year was accepting. We went on to share more than two hours together of quality conversation. To my surprise, before she left for Iceland she had time to send me a short note by mail apologizing for her rudeness with me and offering to make it up to me by spending the day with her on my next visit and staying overnight in her home!

That day in Celia's home she told me that she sees order in others' lives and yearns a bit for that lifestyle. She explained that friends call asking for them to attend a dinner party; She said that they are usually not available for weeks. I got the impression following this visit that the pace of her life is always full of distractions. Yet, my personal experience with her that day couldn't have been more peaceful. She was fully attentive to my questions, gracious, reflective, and thoughtful. I was envious of the order she displayed in the midst of competing distractions.

On a separate occasion she was telling me about several commitments with escalating demands that were all converging in a tight time frame. Almost as if talking to herself instead of me, she said, "This is just too much. Do I quit now? When I'm almost through the knothole? Am I going to cut back?" I found it interesting that during the decade of her 60s she is still questioning the pace of her life choices. I always imagined that past midlife the fatigue of years of fast-paced schedules and demands would give way to a slower pace as authors Riverin-Simard (1988) and Sheehy (1995) have suggested. When we were discussing her demanding schedule, she said, "The problem is I make my life hard. I'm thinking that I don't need to make everything hard." I was, of course, curious as to why she felt "she made her life hard."

> My schedule is frantic. I don't have any time. I take my weekends and I try to breathe easily, but I always know that I haven't brought closure . . . I've left loose ends. The bags are all open and just sitting there waiting. I'll pick

them up again on Monday. I see other people not living that frantic pace. But a lot of people I chum around with do! It's a life pattern.

Celia Burger says she makes her life hard and that a lot of people she hangs around with do the same. Authors Daloz et al. (1996) say that living in a complex world makes it "harder to be human." What they go on to explain is that the pace of our world is pushing us into unknown ways of living, working, and learning. We are not unlike societies that have gone before us in that we are constantly learning new things, but the exponential speed with which we are being forced into new technology, cultures, and people is uncharted territory. It is also harder to be human in that the pace of our lives makes it difficult to be in relationship with others. We're always moving fast. Author John Ortberg (1997) says that "love and hurry are fundamentally incompatible" (p. 87). He says that we cannot be in a hurry, with a pace of life that's exhausting, and still give of ourselves in our relationships. Celia would be quick to say that she has always placed the highest priority in her life on those she loves in her family and I'm certain this has been the case. However, for all leaders, and all adults working in a society with the pace of ours, it is a constant challenge to manage our time, our emotions, and our schedule. For many adults, life is hard.

Leaders' Work and Personal Identities: Integrated, Divided, or Shifting?

The separation of our work identities from our family identities was commonplace at the turn of the 20th century, and continued from 1900 until the 1960s (Robertson, 2000).

For some individuals today, the world of work begins at work's doorway and remains the single focus of a worker's day; then the world of work is left behind physically and emotionally as the employee returns to the world of home and family responsibilities. I personally find the notion of a completely divided identity, like the example I just described, to be difficult for anyone to maintain. The point of the example, however, is to introduce the potential dichotomy the leaders' in this study face in their own work and personal identities. Do they portray a fully integrated work and personal identity to others, or do they portray a more divided identity between the personal roles in their lives and the professional roles? Or, are they somewhere between full integration and full divison, with an identity that appears to shift between the identities associated with their professional lives and their personal lives?

In my own early workplace experiences I found it very unsettling that my sense of self in the workplace seemed to be limited to my role as an employee. I knew that my sense of self was much larger and more integrated long before I understood the complexity of that experience (Bateson, 1990, 2000; Bloom, 1998; Bolton, 2000; Gilligan, 1982; Merriam & Clark, 1991). I also believed that my contributions as an employee would be enhanced by my roles in the home and the community. But the culture of my workplace experience, at that time, was to silence that integration. The silencing of that integration in my professional and personal life felt so awkward and unnatural to me that over time I made career choices that led me to more integrated, flexible, and creative work. Research from business contexts supports my experience.

In Friedman and Greenhaus' (2000) study of 700 business professionals, of which 30% were female, they discovered that the greatest benefit from the integration of work and family is finding a way to maximize the strengths from each domain to help create integration between the two. Often time was not the problem, but rather the psychological interference of work with family and family with work. Helgesen (1995, 1998) points out that working mothers were the most challenged by this, but overall women were better adapted than men to handle the ambiguity, multiple tasks, and relationship networks of work and family. Men and women with increasing levels of authority and autonomy were generally more satisfied with the relationship between work and family. Friedman and Greenhaus assert that, "Employers should value what people bring to their business roles from their other roles. Doing this would mean recognizing and supporting the whole person" (p. 16).

L. Sunny Hansen (1997) approaches work and personal identities from a career development perspective. Her goal is also to develop the whole person for satisfying individual, family, and community lives. She develops an Integrative Life Planning (ILP) concept for career development that emphasizes "connectedness and wholeness to help reconcile dreams and hopes with the local and global needs society faces" (p. xv). In Gilbert Fairholm's (1998) leadership text, he writes compellingly for the inclusion of the whole person in how it is that leadership is defined and understood. Fairholm says that today's business environment "asks leaders to see each worker as a whole person with a variety of skills, knowledge, and abilities that invariably go beyond the narrow confines of job needs" (p. 109).

In Merriam and Clark's (1991) study, they set out to specifically assess work and love, and the interaction of the two in adult life. The authors say that "work and love are the major arenas of adult life. They form the basis of our identity and they organize how we relate to our world" (p. 218). Supposedly, according to Merriam and Clark, Freud once spontaneously said that the capacity to work and to love is the basis of maturity. Merriam and Clark say this idea has been remembered, even though it never appears in any of Freud's writings, because it captures what we intuitively know and experience as adults. They say we also have been taught since we were young that it is desirable not only to work, and to love, but to work in satisfying and meaningful ways while also loving in satisfying and meaningful ways. Merriam and Clark confide:

> We want to find a healthy balance between work and love in our lives, yet both our experience and the extensive literature on this issue indicate the difficulty in achieving this. How do we effectively integrate both domains on a day-to-day basis? Are there ways to balance the two and thereby increase our sense of well-being? The fact that these questions of balance continue to confront us is proof enough that the answers still elude us. (p. 219)

In the remainder of this section, I will share narratives from Ann, Celia, and Merrill in an attempt to describe how they understand the wholeness of their own work and personal identities and how the integration of the two does or does not create balance in their lives. Additionally, I will offer an analysis of the theoretical implications of their comments.

Workplace Implications

Ann Wagner-Hauser was quick to answer my question, "How do you see yourself balancing your life?" She detailed how she sees her multiple roles and identities:

> I don't compartmentalize my life, I see all of my life in its fullness and wholeness. I don't see myself as the wife, the spouse, I don't have children so I don't have that experience, I don't see myself as the bank president, the worker, for me it is very much all whole. It's all blurred for me.

I was surprised by Ann's integrated identity of herself. To me, in her position as a bank president, always "dressing" the part when I met with her, she seemed most likely to say that her work was her work and her home life was very protected. Yet, in her own experience and wisdom she saw "wholeness" in her multiple roles and overlapping contributions from role to role. As a contrast to her integrated identity, she recounts how she experienced the division between personal and professional life in her family of origin.

"I remember calling my father at the office and he would answer in a very distinctive tone, 'Wagner, here.'" She explained that she would try telling him funny stories that had nothing to do with business just to see if she could break through the serious business facade that he created through the tone and style of his voice. She says, "I think the business world has changed tremendously from that. Certainly there is still a hierarchy, but I think there's much more openness to people, to whole lives."

Covey, et al. (1994) states that individuals, regardless of whether they are at work, or at home, are a composite of a variety of roles--spouse, parent, volunteer, friend, employee,

student, community citizen. The desirability of combining work and family commitments and roles is a complex issue with social policy advocates approaching the topic from many vantage points. Suffice it to say, some studies conclude that worker satisfaction contributes to satisfaction at home and vice versa (Friedman & Greenhaus, 2000; Lobel, 1997; Merriam & Clark, 1991; Senge, 1990). The conclusions of these authors were that work creates conflicts and difficulties for families AND it also promotes well being; and family creates conflict and difficulty for work AND it promotes well being. The authors concur that "wholeness" is desirable within the organization and leaders within an organization are wise to support the integration of work and family issues for themselves and employees. Lobel (1997) speaks for human resource professionals on balancing work and personal life and the wholeness of employees. She found in her review of research integrating work and personal life that in studies conducted within the Xerox Corporation and Merck's Canadian operations that changes made to enhance personal life for employees also enhanced the professional life of employees. "Treating employees as 'whole persons' is an essential managerial skill" (p. 138).

Senge (1990) believes that traditional organizations foster conflict between work and family. The organization may make the simple threat, "If you want to get ahead around here you're going to have to make some sacrifices," or they may be more inadvertent. In the latter, the organization will set up demands that include "travel, dinner meetings, weekend retreats, and long hours" (p. 307). This is particularly problematic for women who often have the majority of household and parental responsibilities. Senge believes that in a true learning

organization the boundaries between what is personal and what is organizational are intentionally blurred. He believes that "organizations must undo the divisive pressures and demands that make balancing work and family so burdensome today" (p. 311). "We live only one life, but for a long time our organizations have operated as if this simple fact could be ignored, as if we had two separate lives" (p. 307).

Caution must exist, however, when it comes to "family friendly" organizational policies. The availability of child care facilities, flexible hours, or work-at-home arrangements provide the impression that an organization is friendly and supportive of whole lives. However, isn't it also possible that these programs and policies support the request, or demand, to work harder and longer for the business' ultimate success? Does it give you fewer excuses to leave work for home? Research shows that organizations offering family friendly policies have low participation rates usually because of the possible assumption made by others that an individual that participates is less serious about their career as those who do not participate (Robertson, 2000, p. 78). What subtle control is the organization exerting? With the leaders in this study I was never able to determine the subtle organizational control in their lives. At their levels of maturity, each leader seemed to own their own decisions for how and why they worked, as well as the choices they made around integrating their personal and professional lives.

Gender Implications

In each of these leaders' lives there seemed to be a natural integration between their personal lives and their professional lives. In other words, the identity these leaders had about themselves was one of wholeness as I too, define it. Over my time with them I felt I almost had to force them to see their personal and professional lives as divided. Therefore, when I asked Celia Burger to describe the notion of wholeness and balance in her life she, too, created a picture of integration and wholeness. On two different occasions she described her life visually, and in both visuals she repeatedly used the word "connections" to describe the fluid links she feels uniting the various roles in her life. She repeatedly mentioned the sense of seeing "connections" in her life and using "connections" or "links" as a visual picture of her mirror of her identity.

> If you think about some of these beautiful, handmade woolen tapestries where the strands are woven by the weaver before the piece is woven, some strands are thicker in places than others. Those (thicker) strands that go into the tapestry of one's life are times that they take up more of the tapestry than the other, but they are never broken, they are always there. They form this beautiful visual imagery of change and of patterns within patterns. And for me in the whole of that aesthetic piece, is balance. There will be dominant themes, that sometimes fade out in color and then are dominant again, but there's an overall piece of art. . . . I have always wanted to live my life as though it were a work of art.

Burger is able to articulate in a comfortable, sure voice her experience in finding meaning in the multiple roles in her life and in the connections between the different roles in her life. In Aptheker (1989) the poet Deena Metzger is quoted: "Each day is a tapestry, threads of broccoli, promotion, couches, children, politics, shopping, building, planting, thinking interweave in intimate connection with insistent cycles of birth, existence, and death" (p. 39). Aptheker believes that stories, like the one Burger tells of seeing her life as a tapestry, are evidence of a woman's standpoint and voice in seeing her world. "Friendship, family, children, ritual, community, connection to earth, a belief in life, the need for beauty and art are some of the most evident of women's values," says Aptheker (p. 74). She explains that women's reflections on life as a work of art is an integration of the abstract with the practical--a continual analysis and reworking of the fragmented, episodic events of the day, like watching children grow, working, preparing dinner and moving a load of laundry--all of which are often out of a woman's control but yield a stream of conscious connectedness to daily living and knowing (Aptheker, 1989; see also: Bateson, 1990, 2000; Belenky et al., 1986; Josselson, 1987, 1996b; Merriam & Clark, 1991).

When I listen to Celia describe the tapestry she is trying to create with her life, and then understand Aptheker (1989) connecting the everyday experiences of women, I am struck by other scholars' descriptions of female identity development. Gilligan (1982) was the first to point out that women's development, or maturation process, was different than the male experience. The female experience of identity development often is interrupted, episodic, serendipitous, and though women certainly seek to be competent, they will likely seek

competence in and through their connected relationships, as well (Bateson, 1990, 2000; Belenky et al., 1986; Bolton, 2000; Gilligan, 1982; Josselson 1987, 1996b; and Plunkett, 2001).

Most studies report that the male experience is often more linear and usually more focused on work and achievement, though not always as Merriam and Clark (1991) report. A major conclusion Merriam and Clark reached after their thorough study of the dimensions of work and love and the interaction of the two, questions existing beliefs about the primary role of men and women. Despite the belief that men tend to be more work oriented, and women more love, or relationship oriented, these authors did not find that to be overwhelmingly true in their review. They found that men and women regard both work and relationships to be equally important and therefore posit that it may no longer make sense to view love and relationships as primarily a woman's focus, and work and career as primarily a man's focus.

My time with Merrill Oster was always at his work site. During those interviews I was interrupting his work day. I did not have the opportunity to see him in any other context. Therefore, my observations were skewed toward a more traditional view of male identity in this setting. However, Merrill was quick to point out that work is not what drives his sense of balance or his identity.

"Soulful" Implications

Describing the sense of wholeness and balance that Merrill Oster understands is a bit more challenging for me because of the magnitude of his work and personal environment. His

workplace spans the global financial markets. He has many people supporting him all the time. Oster does not talk about artistic notions of a whole life, or connections, or compartments. His sense of identity looks like his personal convictions applied to daily living. He is very certain about what is most important in his life--his spiritual relationship with Jesus Christ, his commitment to his family, and his desire to make a difference in the social fabric of our nation's culture and beliefs.

Merrill talks about his identity for balancing as a sense of "centering in his soul." He explains, "Most of the time when people see me they would not see a 'balanced person.' My sense of balance has much more to do with my internal centering on the principles and peace of Jesus Christ."

> I don't think there is a perfectly balanced person. If you see us made up of body, mind and spirit . . . you can talk about balance in the same way I look at life on the farm and the 3-legged milk stool. You never wanted a 3-legged stool because the three legs were never all the same length. You would just as soon have a one-legged stool. . . . I think that's part of the dynamics of life that the experiences of life encourage you to bring those three (spirit, mind and body) back in balance. . . . a lot of people don't even know there is a third leg to the stool . . . it's all about mind and body, but not the spiritual.

Oster is speaking above about the wholeness of his life and his desire to equally combine the aspects of spirit, mind, and body. What Oster describes is something that adult learning scholars are also describing. Dirkx (1997) and Tisdell (1999) both acknowledge the

"soulfulness" of all adults. Tisdell summarizes that "spirituality connotes wholeness and gives coherence to live" (p. 94). No other theoretical vantage point so closely describes Oster's sense of his own identity. For Oster, his belief in the teachings of Jesus Christ are the centerpiece for how he sees his whole world and they are the centerpiece of his own identity.

David Whyte (1994) believes that it is difficult to preserve our souls in corporate America, though Merrill Oster has succeeded. Whyte describes a rich soul life as being able, on a daily basis, to remember what is most important to us. Whyte, a poet who criticizes corporate America, believes that too many corporate employees leave the magnificence of their personal lives outside the door of their work lives. He believes in so doing, both the individual and the organization, lose spirit and opportunity to live meaningfully. "Without a soulful entanglement with the world we experience a poverty that no amount of material reward or recognition will ameliorate" (Whyte, p. 266).

Whyte (1994) continues speaking boldly, "Preserving the soul means that we come out of hiding at last and bring more of ourselves into the workplace. Especially the parts that do not 'belong' to the company" (p. 292). These ideas support my own experiences in the workplace. I felt I was being asked to leave my real self at the doorstep each morning and I didn't know how and then I realized I would not. Over time, I have come to understand that much of my own experience had to do with my own soulful beliefs and strong spirit. David Ford (1997) writing about leisure and work says, "One of the most damaging splits is

between, on the one side, a religious life that goes on in a separate sphere, and, on the other, the practical activities that take up most of our time and energy" (p. 138).

An example of this kind of soulful entanglement between an individual and the corporation was something I witnessed the day I shadowed Merrill at his office. I was asked to join a lunch meeting. Before we began eating, Oster and his colleagues took time for a prayer. A colleague of Oster's led the impromptu prayer. He prayed calmly, authentically, and specifically for the day's business activities. He thanked God for the excitement of the day, he asked God to bless the work so that others may benefit. There were small groans of agreement as the prayer concluded. This was obviously something everyone in the room was familiar. Whyte (1994) would say that Merrill has brought his whole self out of hiding and in doing this he is, in fact, preserving his soul. I would agree.

How the Leaders' Lives Inform Me

The three leaders in this study shared with me stories around how they understand balance in their own lives, specifically considering whether their personal and professional identities are integrated, divided, or shifting. The narratives the leaders shared provided theoretical insight into workplace, gender, and spiritual implications of their personal and professional identities. Each of these leaders have obviously given much of themselves to their work, however, after reading and rereading their narratives around their own understandings of their work and personal identities, I am noticing something I didn't notice at first. I approached each of these leaders primarily in their role as a professional. I didn't

have the opportunity to see them as frequently, or not all, in other roles outside work. Yet, what I heard them describe about their own identities was a very non-gendered, integrative, multi-layered, and balanced understanding of their identities. Is it possible that these leaders' steadfast integration of their work and personal identities over time creates for others an image of healthy balance between work and love, as Merriam and Clark (1991) sought to understand?

Living Life With Commitment and Purpose

The elites in this study would have never told me they were balanced people. It is important to point out again that these leaders were considered balanced by others, not themselves. Because I trusted my sources for these leaders, I was relentless about understanding the motivations and passions in each leaders' life. It was becoming apparent to me that balance for these leaders was not about carefully controlled 24 hour days. For these leaders balance seems to be more about an almost uncontrollable desire to do the "right things" through the seasons of life (Autry, 1994, 1996; Bateson, 2000; Coles, 2000; Covey, 1991; Covey, et al., 1994; Josselson, 1987, 1996b; Kouzes et al., 1995; Maxwell & Dornan, 1997; Palmer, 2000; Rosen, 1991; Senge, 1990). In their stories I heard them express a desire to live a life of commitment, to respond to a calling greater than themselves, and to center life around their faith.

Guinness (1998) defines calling to mean, finding and fulfilling a central purpose for your life. He explicates in his book, The Call, that to say you are "called" implies that you

are called by someone or something, and therefore, that you are answering to someone or something. In the narratives in this section I will share decisions each leader has made that were, in my opinion, the result of answering different calls in and on their lives. Individuals who feel called to life's work will also often say, "This is what I just had to do." As the authors of Common Fire (Daloz et al., 1996) report, committed leaders have "very little sense of sacrifice" (p. 196). In fact, Daloz et al. go on to say that "where the heart's deep gladness and the world's deep hunger meet, commitment is conceived" (p. 198). Each leader in this study tells a different story, but what is common among them is the sense of commitment and purpose which undergirds their major life decisions. I believe this commitment and purpose applied in the crossroads of life's journey may well be the key characteristic in what it looks like to lead a balanced life.

Commitment to Others

Ann Wagner-Hauser grew up with great parents and a wonderful family life. She often mentioned the kinds of experiences her mother would expose her to so that she might be compassionate to others who are different. Speaking of her mother, Ann says, "She is the kind of person that when you are around her she just makes you think about your life and reflect. She says, 'If you're not learning you might as well be six feet under.'" Daloz et al. (1996) found in their study of over 100 committed adults that the people they studied were "formed little by little, step by step to become the kind of citizens they are. Their

commitment was not skin deep, nor were the daily choices they made impulsive. They had grown that way over the years" (p. 210).

Over the years at Norwest/Wells Fargo Ann had the responsibility of supervising and managing large numbers of employees. She was ultimately responsible for over 350 people. Through the years she interacted with many, many individuals very different from herself. She was also immersed in excellent diversity training experiences by the corporation. In all of this, combined with the way Ann was raised, I saw deep compassion and commitment to others. She didn't talk much about this, perhaps that's what got my attention. In an early interview at her office she was reflecting on the deep pain she is exposed to in the lives of those working for her:

> Everybody has their challenges, or their crosses to bear. Everyone has had experiences that don't make life terribly easy. You just don't know what those all are. So you have to look beyond the surface and listen for their stories . . . . Perhaps that's where my compassion comes from.

In Josselson's (1996b) research on women's lives from college to midlife she shares in-depth analyses of female competence and connection, the two primary continuums for female identity development across the life span. As I listened to Ann's life story and probed for an understanding of her sense of balance in life I could always hear her stories of relationship, what Josselson calls connection. It appears to me that Ann's relationship skills have always been authentic and meaningful. But what I also saw was the competence with which she carried through on her connections to others. Josselson's findings support my

observations with Ann. "When I asked the women I studied to tell me about the greatest satisfactions of their jobs, they emphasized their gratification in interactions with others," Josselson reports (p. 183). Ann defined her career itself by her commitment to others, as the next example illustrates.

In another conversation we were talking about the progression of her career responsibilities. Without probing, she said reflectively, "I can really cut my career into two halves. The first half I was totally focused on my self and my own personal development. The second half has been focused on others." After several years working with Ann, she indicated that being inside a growing, merging, banking conglomerate has tested her ability to maintain her commitment to others. She explains:

> Over time, with the new banking acquisitions and the evolving culture of the organization, I was really being stripped of my creativity and the opportunity to make a difference. I was losing my passion and I needed to get out.

The women in Josselson's (1996b) study had similar workplace experiences. When the women in Josselson's study felt that they could no longer help others or get things accomplished through others, they became frustrated. I believe that for the women in Josselson's study, and for Ann, once these women were unable to express their commitment to others, and thereby their competence and connection to others, they began to question their purpose in life. This was Ann's next move as well. She admits, "I began to take a look at what was important, and what I had to be involved in."

Stephen Covey (Covey et al., 1994) writing in First Things First says that "principle-centered people see life as an adventure" (p. 291). Ann's adventure, born out of a commitment to others, and an over-arching commitment to live her life purposefully for herself, led her to eventually resign her leadership position with Norwest/Wells Fargo. The story of Ann's transition out of this career and on to her next adventure is interpreted in the following chapter. As Covey points out, "Becoming principle-centered is just that, becoming. It's not arriving, it's a lifetime quest" (p. 291). This is Ann's quest as well.

Belenky et al. (1986) with research focusing on women's voices, would describe Ann's voice in the preceding paragraphs as a women who constructs her own knowledge. These authors describe constructed knowledge as the ability women have developed from being marginalized, to speak in a unique and authentic voice for themselves versus being silent, or relying on other people, or experts, to speak for them. Women described as having the ability to construct knowledge for themselves in Women's Ways of Knowing, told of "weaving together the strands of rational and emotive thought and of integrating objective and subjective knowing." The authors believe that constructivist women act both out of conviction and "out of a feeling of responsibility to the larger community in which they live" (p. 150). One of the most compelling insights from Belenky et al. about women like Wagner-Hauser relates to the type of work she aspires to and the connections she makes between her work and living a life of commitment and purpose. They say:

> Constructivist women aspire to work that contributes to the empowerment and improvement in the quality of life of others. . . . They reveal in the way

> they speak and live their lives their moral conviction that ideas and values, like children, must be nurtured, cared for, placed in environments that help them grow. (p. 152)

Wagner-Hauser's move out of corporate America was courageous, and frankly, uncommon. It seemed as I listened to her story to be a decision she felt "she just had to make." She didn't feel she had a choice to stay or to go, but rather she was "called" to another purpose. In her case, this purpose is in a state of what Covey et al. (1994) calls "becoming." Celia Burger, like Ann, also constructs her own knowledge, and has always heard her own voice in the life decisions she's faced.

Responding to Something Greater Than Themselves

In Celia Burger's home she described, in great detail, her sense of commitment and purpose in life. She must be in a relationship with God, with her husband, her children, friends, and her work. She described the most intimate part of her life to be an innermost circle, "You know, right here where I am," she said this touching her thumbs and forefingers together to form a small circle in front of her. "And then around that circle would be my family, my clan, my community and the world."

She explains herself, "I've just always known that life is so much bigger than this time and moment." She cites Viktor Frankl's belief that man's deepest desire is to search for meaning and purpose in life. Applying Frankl's beliefs to her own life, Celia explains, "Whatever my experiences, sorrows, or difficulties, balance for me is found in this core of

having found meaning and purpose beyond myself in my commitment to children and human rights." She continues:

> I have to find a meaning, there has to be something more than here, I've got to know it's (her life) going to be connected somewhere and I make some impact. So I think I've always enjoyed finding the next step (in life) and where that leads and planning a bigger picture to get there.

Celia more than once described to me a nucleus of love and support within her home, from her children and her husband, that "has always been my personal support and my personal joy. (They) have made the other things I do fun and exciting, but my work is not the center of my life." She on more than one occasion said that her most important work is in the lives she touches, first in her own family and then in the lives of children at school. "My career is important, . . . but when we're all done the only thing that's left are those living messages we send to the future with the children whose lives we have touched wherever they are, and with our own families." Daloz et al. (1996) reports that adults committed to the common good, which I would say Celia Burger is very much included, are never concerned about themselves, they are driven out of a response to something larger than themselves.

One of the themes in Celia's life is her commitment to peace. She feels very deeply about investing in activities that allow her to live out and facilitate peacefulness. "It's very Quaker. I see things very simply." I think she would say that balance for her feels like investing in the right things at the right time. And though investment in her family has always been a top priority, when you listen to her life story it is skewed with a lot of career

engagement. I think Celia would say that the energy she has given to her career is a fulfillment of being "called" to share her gifts--to teach, to serve, to make a difference, especially with children and in support of human rights. She speaks confidently, "I am very committed to helping other women meet their personal goals, to see their untapped gifts and rights, and to encourage and enable them in any way I can." Covey et al. (1994) describes peace as a "function of our deep inner life. It's joyful living. It's found in the midst of life, not in retreat from it" (p. 280). Covey continues, "Peace is essentially a function of putting first things first" (p. 281). In the examples that follow, Celia describes how she put first things first in three major life decisions.

As Celia shared her life story with me she described three turning points she made in response to her commitment to her principles and out of a response to live for something greater than herself. Each of these decisions had to do with the career choices that, in her opinion, allowed her to maintain the kind of balance she needed in her life. The first experience came after the birth of her second son. She says, "When it was time to go back (to work) I couldn't leave my two little boys." She adds, "I stayed home for about ten years. . . . That was a really rich time for me and I'll never regret being home with my children."

The second experience came after more than 25 years working and raising a family in the same community. Both she and her husband were invested in the community and had given extensively of themselves professionally and personally to make the community a better place. However, Celia's career advancement had halted in the school district and she had no where to go. She was wise enough to realize that the administration in place at that

time would never allow her to develop and contribute beyond her position at that time. She says, "I just can't tell you how stifled and smothered I was . . . I felt some bitterness and I thought, 'I don't want to live this way. I just can't.'" As we discussed this experience and her convictions about it, she admitted feeling extreme amounts of guilt about encouraging her husband to seek work elsewhere, to give up established friendships, and to basically "start over" in a new community. But she explains that for her, she couldn't go on, for her this was what it felt like to be "out of balance."

The third occasion she described occurred after moving to the new community and both she and her husband had meaningful work. Celia was employed by an educational testing service. She received a call from the local school district asking her to apply for an associate principal position at a large high school. This is how Celia described that decision: "I did miss the life of a school. It was hard to leave (my current positions). . . . But it wasn't a matter of what it would take for me to stay, it was a matter of where I just had to go." Guinness (1998) writes, "Somehow we humans are never happier than when we are expressing the deepest gifts that are truly us. . . . Instead of, 'You are what you do' calling says: 'Do what you are'" (pp. 45-46).

The three stories that Celia tells describing choices she made to live for something greater than herself, are reflective of research done by Virginia O'Brien in her book titled, Success on our Own Terms (1998). The women who participated in O'Brien's study described success in terms of having passion for their work and their lives (p. 6). "Success is not a destination; it's a journey," said one of O'Brien's participants. These women explained

that their value systems influenced who they would work for, what they would be involved in, and how far they wanted to climb in the organization. "Their hearts led them to professional activities they enjoyed and to environments in which they felt valued and could build relationships" (p. 35). Another participant in O'Brien's research study spoke about her decision-making processes and the desire to do what's right. "If things start to feel out of balance, it's in my control to do something about it. The big thing for me is just being clear about what is important to me" (p. 181). Patricia Aburdene and John Naisbett (1992) pointed out in their research that women in leadership will not be carbon copies of the businessmen they follow. Their "leadership will be tempered by the call of balance," (p. 320). During the times Celia made major decisions I don't think she would have said they were about balance, that would not have been her word. Her words would have been that she "had to live for something larger than herself." The participants in Daloz et al's (1996) study, and Celia in this study, were passionate about their work and they lived their lives out of a response to something greater than themselves. As Celia pointed out to me during one of our discussions, "When you're passionate about something, you don't look very balanced."

Centering Life Around Faith

During the first five minutes when I met Merrill Oster, he shared his love for Jesus Christ with me. I share his belief system, but was at first surprised at his level of comfort in sharing his faith so quickly with a stranger. Within just a few minutes my surprise turned to admiration as I came to understand that his faith is foundational to everything he does in his

personal and professional life (Nash, 1994). For him to omit this foundation in any conversation or business event is omitting his commitment and purpose for living. He does not measure another individual's worth by his or her acceptance of his belief system; he simply believes that the people he works alongside, hires, or plays golf with, should understand the most important priority in his life. Mary Catherine Bateson (2000) concludes her text, Full Circles, Overlapping Lives, with acknowledgment of the centerpiece of our lives. Though Bateson most often speaks of women's lives, her point transfers to Oster's life purpose. "At the very least," she says, (Our lives) "are a dizzying spiral. We move outward as we grow, but we carry a lifelong need for a center--or a process of centering" (p. 245).

Oster describes an early career decision that was based on his process of centering and his principles for living life with commitment and purpose. He was in his first professional position following college and he reflects on what he says was probably the biggest decision he's ever made: "I had spent time in prayer and talking to my wife and I just realized I really wanted to get back to the farm and raise my kids around their grandparents like I was. This is not a money decision. It's a life style decision." At the time he had no idea what he was going to do for a living, but he resigned his position based on the principles for how he wanted to live and raise his family. "It wasn't about money, it was about principles," he says.

Those same principles guide the way he spends his time today. He would say that he considers himself to be in the capstone of his career. He is passionate about making a

difference in the world. Some would say, arguably, that he has accomplished that. Oster sees his life's work as incomplete.

> In the last decade I've really been shifting gears after a hard-charging life. . . . One day I'm almost full time talking to leaders in the Christian world and the next day I'm spending time talking to leaders in the journalistic world, and then it's over in the technology world. Because I'm a business owner, I want to use my business platform, the platform that God has given me, to make a difference in our country. I'm simplifying my life a little bit, but actually these two lives are extricably intertwined right now, I'm probably at the most complex stage of my life.

When Oster describes his work and this phase of his life he overflows with enthusiasm and conviction. He seems urgent and focused. Referring to the description of "calling" offered earlier, he seems to be fulfilling the central purpose of his life based on his commitment to his faith. For Oster, the deep and abiding call on his life and purpose for living is to share his faith in Christ with others. At this phase in life he continues to share his faith through his businesses and faith-based ministries worldwide. Covey et al. (1994) commend individuals who are passionate about their principles. They believe that a deep and abiding respect develops for adults who seek to align their lives with their convictions. Parker Palmer (2000) says:

> Good leadership comes from people who have penetrated their own inner darkness and arrived at the place where we are at one with one another, people

who can lead the rest of us to a place of 'hidden wholeness' because they have been there and know the way. (p. 81)

Merrill Oster would be the first to say that he is not perfect, but it is that very truth that aligns him with Palmer, "people who have penetrated their own inner darkness," are those who are often most passionate and committed because they desire so deeply for others to share in their discoveries. For Oster this reveals the passion he has for sharing Jesus Christ with others. He is fully committed and purposeful in this. To live otherwise, for him, would be to live out of balance to his God and to himself.

In this section I have interpreted closely the lives of these leaders and their decisions to live with commitment and purpose. Ann Wagner-Hauser has always had a deep and abiding commitment to others, Celia Burger often justifies her ceaseless energy and career decisions because of her commitment to live for something greater than herself, and Merrill Oster's faith is the center of his life. Every part of his being, personal and professional, revolves around his understandings of practicing the Christian faith. These interpretations have significantly contributed to my understanding and reconceptualization of what it means to live a balanced life. My discoveries will conclude this chapter.

Moving From the Goal of Balance to a Paradigm of Rhythm

It has not been particularly easy to identify the best terms to conceptualize the issue of balance and integration in leaders' lives even with multiple theoretical vantage points. In

this final analysis of balance, I will include most of the terms I uncovered during this study. Those terms include, of course, balance, but also: control, schedule, juggle, align, multiplicity, complimentary, holism, chaos and complexity, composing, improvising, work and family, life and work, work and love, and rhythm. I will offer my observations, questions, and conceptualization around these terms and suggest that balance is in fact an incorrect term for what I learned from these leaders. Based on the stories I have heard these leaders tell, they are not really "balanced" at all, nor do they aspire to be balanced individuals. They do, however, even in the midst of a frantic pace of life, integrate their work and personal lives, and make decisions that reveal lives of commitment and purpose. It has been my discovery that the term "rhythm," may create a more desirable paradigm for understanding what others see in them and describe as balance. Rhythm may better reflect the notion of balance amid complexity and purpose amid distractions.

Early on in this chapter I confessed that my early understandings about balance revolved primarily around my desire to control my schedule, to master my conflicting roles, and to do that over and over again in 24 hour time frames. I knew that I could improve the way I used the time given to me each day. Bass (2000) says that the "blare of the clock radio comes to define the starting point of our efforts" to control the day. "Our productivity becomes the source of our personal identity" and our date books define the way we approach the day (19). In interviews with hundreds of successful businesswomen, O'Brien (1998) addressed the issue of balance with the her participants. In her chapter on balancing she addressed techniques women had mastered to create more time in their schedules. The

definition for balance in her study was, "that a woman feels as though she is covering most of her bases the way she wants to most of the time" (p. 174). In my opinion, this explanation is as flawed as my own original thoughts.

Authors Covey et al. (1994) in their book, First Things First, revealed that the techniques I, and others, were employing were "time management strategies" for organizing a complex world. Their text's research included the review and analysis of over 180 time management-related studies from business, sociological, philosophical, and scientific disciplines. From their analysis of existing time management studies they concluded that the overwhelming majority of approaches called for improved methods, techniques, skills and support equipment (hand-held organizers, computer programs and scheduling systems) to eliminate chaos and increase order and control. The authors claim that though these approaches make contributions that are valuable, which I would fully agree, they encourage "human doing" versus "human being" (p. 327). In other words, individuals may be checking off things to do but not questioning if the things they are "doing" are most significant to them.

One of the recurring themes in the narratives of working females (Aburdene & Naisbett, 1992; Bateson, 1990; Helgesen, 1998; Josselson, 1996b; Mulqueen, 1992; O'Brien, 1998) is the desire to construct a work and family balancing act that not only allows women to be competently involved in meaningful work, but also allows these same women to choose and design an integrated work and family picture of themselves called to, and aligned with, their personal value systems. The word "align" or "alignment" is used to describe

balancing multiple demands at work and at home; it is the most often used term in the business literature (Covey et al., 1994). This seems to reflect strategic business planning which also uses the term alignment to describe the aligning of multiple business processes within the organization. It suggests to me "lining up" my priorities, or "getting in a line." Though I understand the intent of the word choice, I do not consider it to be ideal for the stories I heard the leaders share. I believe this, too, suggests an ability to control time and schedule.

In the periodical, Life @ Work (2000), authors Addington and Graves in their article, "Juggling Life" offer the following definition of balancing life: "The ability to continually recognize and juggle the multidimensional assignments and opportunities in life" (p. 43). The concise, poignant nature of this definition drew me into an analysis of exactly what each carefully selected word suggests relative to balancing life. The word "ability" suggests to me my previous belief that an individual's ability to consider balance is derived through either pain or privilege. "Continually recognize," suggests that balance is not a static issue in our lives. Circumstances constantly change and the demands of leadership, as the participants in my study suggest, place ongoing obligations and expectations on individuals. A leader may be relatively balanced for several years, but as life circumstances or work demands shift, balance may be more or less difficult to maintain. These same authors suggest that juggling multiple responsibilities can perhaps be managed more easily if they are sorted out by being either a life "assignment" or a life "opportunity." They suggest that assignments are responsibilities and commitments that we have little or no control over. What might be an

assignment for one individual, might be an opportunity for another. I particularly resonate with distinguishing assignments and opportunities. For me, it is easy to identify my life assignments. It is more challenging to choose among many good opportunities.

Addington and Graves (2000) include the word "juggle" in their definition of life balance. They say, "Juggling isn't a skill people are born with; it's an art that has to be learned...that's one of the enigmas of balance--it's a combination of concentrating on only one thing at a time while simultaneously performing multiple tasks (p. 45)." Whitehead (cited in Nash, 1994, p. 218) says that the juggling metaphor really isn't appropriate because it implies that all the demands are "qualitatively indistinguishable." In other words, if you try hard enough you can learn to juggle or balance the demands. Bateson (2000) has another interpretation of the word juggling as it relates to balancing life's competing demands. She says that, in particular, women with greater financial resources, spend a lot of time thinking about the combination of career and child rearing. She criticizes, "The most common way of describing this complex composition is the cliché of juggling, a pernicious metaphor because it suggests a frivolous trifling with what is most precious--and constant anxiety about dropping something, perhaps a baby" (p. 29). She recommends the term "composing" because she finds it suggests a "search for distinctive ways of fitting diverse elements into a unity . . . . a continuing search for harmony and for dynamic dissonance, the many elements never brought into perfect balance, certainly never completely merged" (p. 30).

The leaders in this study continue to compose and improvise their lives. There is not perfect balance. In Mary Catherine Bateson's (1990) qualitative study of five competent

women's lives she, too, examined multiple demands over time. She recognized that much of the confusion over competing demands on our time has to do with how we see the different activities--as competitive or mutually enhancing (p. 168).

> In the economy of finite resources, an arithmetic of addition and subtraction applies, and all games are 'zero-sum' games: if you spend time in the office, you are not spending time at home; the money that goes to Paul cannot also go to Peter; if the father leaves all his land to his oldest son, there will be none for the younger sons. In the economy of expanding resources, the games are 'win-win' games: the arithmetic is multiplicative, credit can expand indefinitely; a day of rewarding effort can send you home frisky and exhilarated; a change in technology allows the land to produce more. It is almost impossible to keep these two ways of thinking in focus. Each reflects important truth and dangerous error. Most people have temperamental preferences for one style or the other, but either, by itself produces nonsense. (p. 169)

I believe that the leaders in my study, Wagner-Hauser, Oster, and Burger, have a temperamental preference for win-win games and for seeing multiplicity as enhancing versus competitive. On more than one occasion I noticed how they were energized by competing parts of their lives. Bateson says that "classical physics has taught us that energy is finite and should be conserved" (p. 169), but when it comes to observing human potential, energy is contagious and empowering. For instance, when I observed Celia Burger in her school and later questioned her about the pace of her life she said, "Anything you feel passionate about

can be all consuming. And that doesn't look very balanced." When Merrill Oster first described balance to me he said that he thinks of a 3-legged stool and the need to keep that balanced--with spirit, mind, and body. But he quickly admitted, "If you were to watch me at any given time you wouldn't see a balanced person. You would think I'm very out-of-balance." He was referring to the pace of his life and the intensity of his work. He said, "I'd rather you look at the intent in my choices. Ann Wagner-Hauser when I first met her exemplified a very out-of-balance, albeit, competent and focused career woman. All she did was work. Over time I began to understand her commitment to relationships and the people she served. She was an excellent leader of people in her organization and likely advanced in the organization because of her commitment to others. But at any given time, that did not look balanced.

The term 'balance' is not one that resonates for everyone. I must admit to my own declining enthusiasm for the word itself. For me, it insinuates that "if we all try hard enough" we'll be able to master and control our lives. I've come to understand this is not realistic. Individually we repeatedly experience failure in trying to control our schedules and master the balance of our lives. Our lives are full of interruptions, inconsistencies, complexity, unfairness, diminishing resources and too much information. The lives of the leaders I studied is not mastered or controlled. They never claimed to have their lives mastered or controlled before we met or during the years we met. The culture we live in steals time from their schedules and lives as well. Fraser (2000) says of the overworked, stressed-out white collar professionals in her study, "Again and again I heard stories that left me wondering whether

my contemporaries had been overworked and stressed for so long that they had lost all sense of balance, let alone a vision of what a better work life could be" (p. 227). Yet each of these leaders were selected because of something unique others saw in them, and attributed it to "balance." Each of these leaders were revered by their colleagues, friends, and community members for the lives of service, character, and contribution they are achieving. But I don't think balance is the best paradigm for these experiences.

The leaders in this study know that their demands exceed their opportunities for fulfillment. They have for a long time lived under expectations that are always incomplete. Yet, it appears they have created a rhythm for order amid chaos, to the degree that others sense commitment and purpose in the way they choose to live their days. I don't fully understand this. Celia Burger remains calm in the heat of an angry parent's allegations of wrongdoing. Merrill Oster reserves time each morning for quiet solitude and reflection before facing the nearly always open and accessible worldwide financial markets. Ann Wagner-Hauser, walks away from an impressive salary, stock options, and secure employment for unknown risks and self discovery. Is this rhythm? Is this multiplicity? Is this the integration of multiple roles and conflicting demands? What I do know, is that these experiences are different than boxes of white space and carefully scheduled weeks that include attention to spirit, mind, and body in any given 24 hour period.

Peter Santucci (2000), in an interview with Eugene Peterson, says that "balance" is a dead word that gives the impression that we are somehow able to control it. He prefers the word "rhythm" because rhythm is a living thing. He also believes that when you look at your

life rhythmically you will more easily discover an integration of the various roles in life--spouse, friend, employee, and community member. David Whyte (1994) and Margaret Wheatley (1999) both write about their analysis of corporate America saying that the ability to combine chaos and order is most desirable in today's organizations. Whyte explains that the 'balancing act' is normally described as dealing with conflicting demands on individual time and energy. But that the 'balancing act' should be seen more in terms of a vibrant tension between opposites. "Stop choosing," he says, between chaos and order, and learn to live instead at the boundary where rest and action move together. (p. 242). Wheatley supports, "Chaos and order...change and stability. Just as in the timeless image of yin and yang, we are dealing with complementarities that only look like polarities. Neither one is primary; both are absolutely necessary" (p. 23). Whyte adds another admonition, "imagine your life as a piece of music. But stop putting all your attention on the notes." (p. 241). In the concluding chapter of his book he says, "The rich flow of creativity, innovation, and almost musical complexity we are looking for in a fulfilled work life cannot be reached through trying or working harder" (p. 298). And Parker Palmer (2000) says that many adults "fear the natural chaos of life" (p. 89). Palmer explains, "We want to organize and orchestrate things so thoroughly that messiness will never bubble up around us and threaten to overwhelm us." However, he continues, "Chaos is a precondition to creativity" (p. 89).

My understanding of balance in leaders' lives has been significantly redirected as a result of my time with these leaders and as a result of my investigation into the concept of balance. I believe that rhythm is as individualized as the individual. There is not one musical

score that works for every individual. However, based on the observations of three high level leaders, there is a pattern of peace amid chaos and clarity amid complexity that gracefully moves within the lives of these leaders.

I have come to understand that "rhythm" and "art" seem more desirable than "control" and "schedule." When I think about balancing my life as a "rhythm of life" or "creating a piece of art" with my life I feel differently about the approach I take to my days, weeks, and seasons. I believe that moving within the rhythms of my life integrates order with chaos in a comfortable respect for each. It also celebrates time as a gift and the acknowledgment that its passing is inevitable. There will be confusion, competing activities, and complexity. I will speculate that what I, and others who have worked closely with these three leaders, may be seeing in them is an ability to be comfortable with chaos in a complex world. What is memorable in spending time with these leaders is the incredible pace at which they have functioned for 20, 30, or over 40 years successfully, combined with a seamless integration between their work and personal identities, and very intentional manifestations of their commitment and purposes in life. Based on my learning through the narratives of these leaders, I am understanding that complexity in our work and personal lives is inevitable and the ability to move rhythmically within that complexity is desirable. These narratives redefine the goal of balance as a paradigm for rhythm.

ADULT DEVELOPMENT AS NARRATIVE: THE SURPRISE CASE STUDY

Ann: Our dinner table was a hotbed of discussion. We could be seen and heard as far as my parents were concerned. . . . We talked about anything and everything. You could share your views, you could argue, with no hard feelings. So when I think again about your question about learning...for me it's experiences, but it's more than that...how I talk is sometimes how I work through things. . . . So it's the event, but it's more than the event, the experience, it's really giving thought to what happened.

Pam: I use the word reflection, the learning is in the reflection.

Ann: Yes! You're right! That's a very, very good word for it.

Pam: I really think that learning doesn't happen until you've had the opportunity for reflection. So for you the learning was in the articulation?

Ann: Very much so.

Pam: You didn't even know why you were doing it?

Ann: No, it's just always been very comfortable for me. Gosh...you're bringing up so many thoughts...it's just amazing this process!

Ann Wagner-Hauser discovered these personal preferences around the role of "talk" in her life during our first meeting together. In those conversations she was creating for herself an understanding--or meaning making--around her preferences for learning and how she makes sense of her world and the challenges she faces. She confessed that she had never really

thought about how she prefers to learn. Little did either of us realize at that time--the first of more than a dozen lengthy conversations together over almost five years--just how powerful the process of narrative knowing and meaning making was going to be in her life.

In this chapter I will continue to use narratives from Ann Wagner-Hauser to build a case for the influence of narrative as adult development and present, by way of this case study, the contributions of narrative as a theory of adult development for adult learning practitioners and scholars. My belief is that this case study will contribute to a small, but growing body of adult development and adult learning research, that supports the use of narrative as an emerging theory specifically for adult development. Let me quickly confess that my intention, or point of view, when I began my time with each of the three leaders in this study was never to impact or change their life course. That thought had never crossed my mind, and it is humbling at this juncture as well. My sole intention was to understand their life histories through narrative story telling. I sought to listen, understand, and interpret their stories with writing that made their stories come alive in the text.

Ann's Boat is Rocking

Ann Wagner-Hauser, by everyone's definition, is competent, determined, an excellent manager of people, and very well-liked. She is a self-starter. She always answered my questions with thoughtful contemplation and sincerity. To me she appeared to fit inside the glove of corporate financial leadership very snugly. When I would ask personal questions about the way that she balanced her life, the number of hours she worked, or the decision not

to have children, she answered with certainty and authenticity. My interpretation of Ann was that she was doing exactly what she wanted to do. She liked her work and her personal life and she wasn't seeking to change either.

My purpose was not to change her. My purpose for our time together was for me to understand her stories and experience. I am a very good listener. She tells me that I successfully navigated the art of "not judging her." She tells me that she felt very safe with me. And in that safety she began to verbally explore her own thinking, her questions and her dreams. Her exploration and adjustments came slowly over time.

Often after we had been together I would send her follow-up reading material that I thought she would enjoy, and albeit, would be thought provoking to her given the conversations we had shared. We rarely discussed any of those materials. I recall that one such reading was from Fortune (Sherman, 1994) entitled, "Leaders Learn to Heed the Voice Within." The authors interviewed high level executives who had chosen to take a professional break, or sabbatical, from their demanding lives so that they might take several months, or years, assessing their lives, and dreams. "The unexamined life becomes a liability" (p. 93) to organizations, Sherman believed. Even with that mailing, my intent was not to persuade her. Though I do confess her life at that time did seem to me to be unexamined.

She confirms over and over that she felt a complete lack of judgment from me during our years together. I noticed that she began to alter her life's direction and dreams. She began to answer my questions differently. She began to ask me different questions. Though always very competent and sure of herself, she seemed more curious and more interested in the

future than the past. She was quick to say it was "my process" that allowed her to assess the life that she was living and to discover the freedom inside her to explore and make significant career changes. The turning point in her story unfolded to me over lunch in the cafe of an urban Art Center.

We met at her office as had become our custom. She immediately asked, "What should we do? How about if we go to lunch away from here?" It was the first time she had been interested in leaving the downtown business area where she worked. I thought the change was great. She was dressed again in her heels, as always a very pretty professional skirt and blouse. She led me down the elevators and through the parking garage to her reserved parking space and her black Mercedes. I did not comment on the vehicle. I have learned that as a researcher, "researching up," it is desirable to "be like my respondents" so that rapport is the strongest (Ostrander, 1993). When working with elites Ostrander points out that minimizing any perceived differences between the researcher and the elite strengthens the relationship.

We drove for about 15 minutes talking casually about her mobile telephone system and some of her statewide traveling. Once inside the Art Center she led us to a quaint cafe where we were seated near an interior courtyard. It was a sunny, warm day. We had been seated less than a couple minutes, and had just settled into our chairs. Always anxious to direct the conversation to her life, I immediately asked, "Tell me, what's going on with you?"

She looked into my eyes and said without hesitation, "I'm walking away. I have committed to walking away from my job. I am going to totally quit what I'm doing."

I know that I immediately reacted with, "That is great!" I'm sure that my face was smiling the whole time I was musing over her decision and the pride she felt in herself. I was experiencing shock at her announcement and complete, unabashed pride in her ability to sever the bonds of a large organization. My own preferences for how it is that we should live our days was being realized in her story. I was very proud of her, and of course, curious.

We spent four hours that day talking about her decision, her dreams and the privilege and choice she was enjoying. I was one of three "friends" she had chosen to share this very confidential information. I said to her during our lunch, "I would have never dreamed you would do this when I first met you four years ago."

And she said, "I never would have either."

On our way back to her office that warm, spring afternoon I asked, "What do you think about this experience of working with me?" She lifted both hands from the steering wheel and put them back down for emphasis and claimed, "I just love it! This has been great! I look forward to it. For me this is therapy." Then she added, "I hope you're not offended. For me, it is so good to think about and reflect on my decisions and my thinking, knowing that I have such a good listener. I hope it's helpful to you." Which, of course, it has been helpful to me, but my story about this experience is different because of my responsibility to tell her story, my story, and our learning.

She said many times in different ways that she hoped that we could get to know each other as friends; that she really likes me. The feeling is mutual. From the very beginning it has been easy to be together. I walked back to her office to take advantage of her local phone

directory for business of my own. When I departed I reached out to her with a long embrace, versus our customary warm handshake. I felt tremendous responsibility and intense privilege to be in on the confidential decisions in her life.

Over the weeks and months that followed we would exchange impromptu, versus purposeful phone calls. Only two weeks after she confided in me with her plans, the mutual business colleague and friend who had led us to each other, was killed in a tragic sky diving accident. He was one of the other two individuals who knew Ann was planning a major career transition. We shared tears, grief, phone calls, newspaper articles, videos of news stories, and an emotional funeral. Early on a Sunday morning after discussing the details of his accident she said, "I had intended to send a note or call you to say 'thank you' for your reaction to my decision to walk away from my job. I loved our time together, your reaction was incredible."

I quickly responded, "I felt pride . . . like a good friend or parent who had helped you." We said good-bye. I sat quietly. This was very interesting. What I was really feeling was the "influence," of my life on hers.

After Ann Wagner-Hauser publicly announced that she would be leaving Norwest/Wells Fargo I met with her for the last time at her office. Her secretary came into the waiting area explaining that Ann would be a few minutes. Then, walking away, her long-time secretary said, "I'm going to call you her 'inspiration.' You and a very good friend who died tragically, were a big part of her leaving." I'm sure I smiled, but inside I felt the dichotomy of being overwhelmed by that information while at the same time being pleased in

knowing that my life was impacting hers. My unencumbered desire to understand her life over time was unpredictably becoming intricately woven into the fabric of my own life.

Why Now?

Why did Ann Wagner-Hauser make this life transition at this time? Was there other significant learning occurring at the same time? Was she reacting to pressure within the corporation? Was her personal life changing? Does this process always yield these kinds of results? Would she have gone through this same transition at this time without my involvement in her life? Some of these questions have answers, others do not.

The other two leaders in my study did not experience this kind of adult development or transition over the years I met with them. They were both courteous and very supportive of my research, but they did not move through a transition like Wagner-Hauser over the years we worked together. I personally believe that Ann Wagner-Hauser is honest in saying that our process together, specifically my thoughtful questions and non-judgmental listening, allowed her the opportunity to reflect on and evaluate her life. I believe that through our process she "talked" her way through to a new developmental phase. My belief that the non-judgmental listening and the process of talk moved Ann to a new developmental phase mirrors the experience of Bloom (1998). In her study of two feminist educators, the two participants appreciated the non-judgemental listening and the overall process. One educator in particular believed that the reflective, collaborative nature of their work together actually pushed her into analyses about herself and her life as a whole that she would not have

experienced in the absence of the research process. The safety of the research relationship is also fundamental in Ann's conversations with me.

In the saftey of our research relationship Ann's transition and developmental story over time was disclosed to me in more than a dozen lengthy conversations. In this chapter I have organized those discussions into an analysis of the narratives related to Ann's development, identity, and transition, and then narratives related to our relationship. In the narratives related to the research relationship, I will discuss the value of listening along with Ann's sense that our experience together was like "therapy." I will discuss if what we experienced together was a friendship or a relationship, and I will reveal the story I wanted to tell for Ann, alongside the story she told. As a conclusion to the chapter I will discuss the contribution this developmental case study makes to narrative as a theory of adult development and learning and make suggestions for improvement to that theory.

Frankly, there are many theoretical vantage points from which to interpret Ann's story. Many theories offer enticing insight into her experience. However, in keeping with my own theoretical foundation for understanding the lives of these leaders, I have chosen to understand and interpret Ann's developmental experience primarily through research related to adult development and learning. Specifically, I found the theory of adult development as narrative, (Rossiter, 1999a, 1999b) and research in women's development, identity, and transition (Bateson, 1990, 2000; Belenkey et al., 1986; Bolton, 2000; Gilligan, 1982; Hayes, 2001; Josselson, 1987, 1996a, 1996b; and Merriam & Clark, 1991) to be particularly pertinent. Adult transformation theory will also be a lens for discerning Ann's

developmental journey (Mezirow, 1990, 1991, 1994, 1995, 1996, 1998, 2000). Let me quickly point out, however, that the scholars in adult development and learning often build upon feminist scholarship, psychology, family studies, anthropology, and qualitative methodology in general. Therefore, works from other disciplines will also be included as appropriate. As a result of this research, I have been confirmed in my belief that narrative has the potential for learning and change. The narrative analysis that follows provides a storied look into the life of an elite corporate leader moving through her own midlife transition, development, and learning.

Narratives of Adult Transition, Development, and Learning

Four Years Before Walking Away

Today I met Ann Wagner-Hauser for the first time. She was delightful! Within the first few minutes she began to share a picture of her family of origin and the role they played in shaping her character. "My parents were just very, very high integrity people; they had high standards. I grew up in a loving, nurturing environment where they tried to instill in me to always do my best," shares Ann with the utmost pride still in her voice. She knows that her experience growing up was a fortunate one and she knows it continues to impact her significantly.

Ann's story about herself, the unity and purpose for her life, was influenced from her very early years by her family and parents. McAdams (1996) says that our very early years of life determine the "narrative tone" of our stories about ourselves for the rest of our lives.

If we have experienced a secure attachment to loved ones, we will likely develop an unconscious belief that we can attain those things we wish for, our lives are filled with hope and trust, and we begin to create a story that will lead predictably to a happy ending. Insecure attachment, McAdams believes, will often lead to the creation of more negative stories. I listened to this same narrative tone in Ann during the five years we were together. She exemplifies the theory McAdams has investigated and reports.

McAdams (1996) also proposes three stages to our storytelling: premythic, mythic, and postmythic. In the premythic phase, our early years and through adolescence, we are collecting information and experiences which we will use to provide our life story with what he calls, "unity and purpose" (p. 136). The mythic phase of adult storytelling constitutes the majority of our adult lives. The final phase is the postmythic phase which begins when an adult believes that their story cannot be substantially changed. The years I was with Ann she was in the longest phase, the mythic phase. During these years we are constantly reshaping and retelling our evolving story of our selves. The main character in the story, the I, or the Me, are "imagoes," explains McAdams. "An imago is an idealized personification of the self that functions as a main character in the life story. Imagoes are like little 'me's' inside of Me who act and think in highly personalized ways" (p. 141).

The primary imago that I heard from Ann in this very first meeting and throughout all others went like this, "I've always been very determined. If there was something I was going to do I was going to do it by sheer will if nothing else. . . . I was not afraid of anything. I was, but I just didn't want to let anyone know." This was not her only imago, as McAdams

(1996) says, but it was the dominant imago I heard. As I listened to Ann talk many, many times about her parents' lives and the impact their lives continue to have on her, I am sure that she, too, desires to have an everlasting impact on others. Her narrative tone was always positive, always hopeful, always full of energy and questions.

Three Years Before Walking Away

"I've always felt that I was in control of my life. . . . I've never had any serious doubts that I would survive. . . . I will also admit that I've been pretty darn lucky," says Ann Wagner-Hauser during our second visit together. Her sense of control and determination in the face of daily leadership pressure, is pretty clear. She is a survivor and a play-maker, but her days are not easy. She makes the most of her circumstances and tries to stay positive. She speaks about her workplace environment:

> I am in control of me and my reaction to whatever the future holds, and I can choose to deal with whatever comes in a positive manner. There is so much that can drag you down. I have learned that I cannot make anyone else happy. I have a choice, as does everyone, with what we do with our lives.

At this point in time I don't think Ann was consciously thinking about any career changes, but I hear her thinking about the emotional pressure in her life. She has decided that even with the excellent set of supervisory skills that she has, she cannot control other people and they cannot control her. She seems to establish that she has the choice to react to others or make the choice not to react. She also seems to admit that she is not able to make

everyone else happy. She may be acknowledging the limits of her leadership and if she is able to impact change in her own life and others to the degree she prefers.

An additional element of McAdams' (1996) beliefs about narrating the self in adulthood comes at midlife, introducing an interesting narrative foundation for Ann's unfolding story in this chapter. He says, "As one moves into midlife, subtle changes in story-making and telling begin to appear" (p. 142). Specifically, he points out, there will be increased desire for balance, which presents as increased needs for harmony, and reconciliation. It is also in midlife that adults begin to consider how they want to tell the ending of their life narrative. "Though men and women may be at the prime of their lives in their middle years, the social clock suggests that the end of life is closer to the present than is the beginning of life" (Neugarten, 1968, p. 143, as cited in McAdams). "In their forties, fifties, and sixties, men and women in contemporary Western societies begin to consider in more detail and with greater urgency the problem of construing an appropriate ending for their self-defining life story" (McAdams, p. 143). He says this story ending is often crafted to leave the "gift" of their life to others and to subsequent generations.

Even though an individual in midlife may be thinking about the way he or she wants to write the end of their life narrative, as McAdams (1993) explains, he also points out that midlife crises have been popularized by American culture. He says that American media talks about midlife crises as if they were some sort of expectant "luxury" that everyone will experience (p. 196). He rectifies that belief by pointing out that scientific researchers do not find the same preponderance of evidence for midlife crises. McAdams goes on to say that the

more likely experience at midlife is a private, subtle confrontation with own identities as we envision ending our life stories. McAdams (1993) says that we "endeavor to put the many pieces of our life story together into a more integrative and generative whole" (p. 220).

Reflecting back, I can detect, even in this second meeting, a sense of questions from Ann about her life and her work. She seemed to be affirming her sense of choice and control in her life, saying, "I have a choice, as does everyone, with what we do with our lives." In the framework of adult learning, "adult" is defined as being reponsible for our actions, or choices. Mezirow (2000) points out that the process of making fully autonomous choices is never fully realized. The questions that Ann is beginning to ask may signal the early stages of her own critical reflection. Is she initiating a complex, self-directed look at her long-held assumptions about her life? Could she create a story within her current organization that would allow her to narrate harmony and reconciliation in her own life? Is she saying in this meeting that she does not have control of others, but she does have control of herself? Is she separating her identity, to some degree, from the organization's, by saying, "I have a choice?" Is she gently talking her way into a possible transition?

Two Years Before Walking Away

Prior to this office visit I had sent Ann the Fortune (Sherman, 1994) article "Leaders Learn to Heed the Voice Within." I had read it before my last meeting with Ann. I must have heard in her voice questions about herself and the meaning of her life. As mentioned earlier, the author of that article interviewed several elites who had walked away from their high-

powered leadership positions for the purposes of clearing their minds and schedules, to assess their lives. I asked Ann if she ever feels like she needs to take a break?

> Yes, absolutely. As a matter of fact, I'm 41, am I at a midlife crisis point? I don't know. But I'm looking asking myself, 'What do I want to be when I grow up?' For me, I never dreamed I'd be at the point I am today with what I've achieved. You know, what's next? Where do you go from here?

It's usually a rhetorical question, "What do I want to be when I grow up?" The question might initiate good table talk, and curiosity around alternatives and choice. But is "what do I want to be when I grow up" a good question for women of any age to ask? I believe this question, though one I, too, have been tempted to ask of myself, suggests defeat or apology for the life already lived. I wonder, too, if women ask this of themselves more than men? Heilbrun (1988) states, "We women have lived too much with closure. This is the delusion of the passive life. When the hope for closure is abandoned. . . adventure for women will begin (p. 258). Let me explain Heilbrun's comments as it overlaps with Ann's question, "What do I want to be when I grow up?"

I recognize that Ann's question may have been simply rhetorical, but I will use her question as a symbol of women's developmental voices. To me, asking the question, "what do I want to be when I grow up?" does discount a woman's experiences to date and silences the possibilities that are lying unsaid in a woman's head or heart. Bateson (1990) and Josselson (1987, 1996b) both discuss the fullness, complexity, and absolute uniqueness in women's lives; they also point out that this fullness and complexity contributes to all areas

of women's lives. Heilbrun (1988) says that women live with too much closure, we don't give ourselves enough choices, or allow for multiple perspectives on a given situation. We may be caught trying to pinpoint the "right answer" to complex questions and in doing so miss opportunities for learning, and adaptation. "What do I want to be when I grow up?" sounds like a kind of question that's supposed to have one answer, and if we live our lives "correctly" we will discover the one true thing we should do. The discourse of society is generally more affirming when adults can articulate the life course they are following. Raising the question, "what do I want to be when I grow up?" invites others, outside of the self, to contribute to or even try to own the answers to the question.

In Women's Ways of Knowing, authors Belenky et al. (1986) listened to the voices of women and identified varying degrees of ownership in decision making and life choices. Let me point out two opposing ideas related to Ann's question, "What do I want to be when I grow up?" First, it struck me that Ann generally portrayed the most mature voice of the women in Belenky et al.'s study, constructed knowledge. As a woman who constructs her own knowledge, she hears her own voice and integrates it with other voices, and she recognizes that different points in time and different situations net different answers. If this is the case, her question is sincere and she is seeking input from others, in this case, perhaps me. Kegan (2000) talks about this ability to discern multiple voices, including one's own, as a "self-authoring mind" (p. 68-69). He encourages adult educators to cultivate the self-authoring minds of their adult learners, as well as pushing learners to see their incompleteness and need for growth. Ann often seeks feedback about herself so this is a likely scenario.

A second idea to consider when Ann asked the question, "What do I want to be when I grow up?" is that she is beginning to confront uncertainty and questions in her work and personal life. She is exposing her real thoughts. Women are generally regarded as having an abundant supply of self-doubt, so questions like this confirm the stereotype. In this second scenario, Ann is at this point in time, transferring her power to others, allowing them to think and decide what's best for her. I am not certain either interpretation is accurate, but suffice it to say that in this question, "What do I want to be when I grow up?" I heard for the first time dissonance, or an uncertainty in her story that I hadn't heard before.

One Year Before Walking Away

"It's been fun," Ann says referring to the changes in her organization over the last year. She tells me more about her work and finishes again with, "So, it's been fun."

When she said, "It's been fun," the second time I noticed. I noticed she was using the past tense, like something was over. This day she didn't sound as sure of herself as she had in the past. Is she trying to convince herself of something? Is she hiding something? She definitely had other thoughts on her mind beyond the organization.

> Maybe I'm hitting that midlife crisis point. . . . You know, where from here? I'm still relatively young, is this what I want to continue to do for my life? It's not that there is any dissatisfaction. I'm just old enough to have seen a lot, and there's still a whole lot of life left. You feel like there is that turning point where the decisions you make are going to write the last part of your

working life. . . . I think sometimes we get locked into a clear path thinking about how things have to be. . . . At times I think, is it appropriate to step out, clear my head and figure out what I want to do? I'm not sure.

Female Identity Development. These were compelling thoughts from Ann. She stayed with this kind of conversation during much of our time together. I remember thinking that she seemed to be moving back and forth between differing stories about herself, her identity, and her future. She also introduces for a second time the query, "Am I at a midlife crisis point?" Sherman (1987) says that "one of the most critical transitional problems in middle adulthood is the emergence of an imbalance or dissonance between the two components of work and love" (p. 5). Ann questions her life in the narrative above, wondering if she wants to do something different, and at the same time clarifying that there is not any dissatisfaction in her current life. Landau (1985), writing about midlife transitions, devotes most of his text to adult reactions to unplanned, off-time life changes. In Landau's text he references Levison (1978) who is well known for his research on the midlife crises of men. It seems probable that this research reflects a gendered presentation of midlife transitional experience. I am also sensitive to the attention an exciting midlife transition, or crisis, may receive, over the more subtle, quiet midlife transitions. In my opinion, Ann's curiosity about midlife crises (though she chooses to use the familiar word, crisis) appears to be different than most writing about midlife transitional experiences which are primarily devoted to the experiences of men. It is also possible that given the popular notions of

midlife transition that reference male behaviors, that Ann may refer to the male experience unknowingly.

What I hear Ann questioning, even in these early conversations, is her desire to live with greater meaningfulness and significance. She wonders if she's missing something. I can see now that she is acting proactively, versus reactively, to her internal desire to live differently, though she is not certain at this time what that means. "Meaning-making lies at the heart of those turns in the road that people think of as life transitions," says McAdams, Josselson, and Lieblich (2001, p. xv). "People choose to make changes in their lives, or they make changes in their experience of their lives in response to external events" (p. xvi). At this point in time I cannot see what external events may be impacting Ann's story. It is easier for me to understand an internal rather than an external desire for change in her life. I also perceive other dichotomous possibilities in her developmental story. Let me explain.

I believe that the cohort that Ann belongs to as a business woman has had no other model than the career paths of men. Therefore, Ann followed the behavioral examples of her father and other men around her. By her very nature she is independent and autonomous, so the ability to model "male" workplace behaviors was not a stretch. Career development literature cites two important contrasting concepts, "agency," and "serendipity," when in comes to reviewing female career development. Plunkett (2001), studying the career development of young women, points out that agency is the "widely regarded model of career development based on men's development and not characteristic of most women's lives" (p. 153). Agency is defined as the existence of a clear goals, long-term career strategy, and

obvious ambition. Plunkett says that serendipity is most often found in feminist and narrative scholarship on women. It is described as fortunate or positive occurrences, and a more internal sense of goals, strategy, and career intent. In the women she studied, there seemed to be characteristics of agency and serendipity existing side by side. The career development process over a lifetime required both "planfulness and exploration" that would resurface during times of transition (pp. 171-172). I noticed over the time I was with Ann that she, too, seemed to employ both characteristics of agency and characteristics of serendipity that concurs with Plunkett's observations.

Ann was also employing her desires for relationship and connection through her successful relationship and marriage to her husband, and through many friendships. At no time has she omitted the desire for close relationships. However, I am curious if the transition she desires is to bring these two often opposing developmental profiles into a closer alignment, or integration, one with the other. Josselson (1996b) points out from her study following 30 women from college to midlife, that during the late thirties, women on demanding career tracks, began to ask themselves if work was worth the effort. Merriam and Clark (1991) refer to this as the tension between work and love, Bateson (1990) refers to it as "multiplicity," Josselson (1996b) uses "competence" and "connection," McAdams (1993) "agency" and "communion," Bolton (2000) refers to it as "service" and "achievement" with an ultimate desire for harmony, and Gilligan (1982) points out that women want their lives to be represented as a "web" rather than some kind of "linear progression." In a critique of all writing related to the psychosocial development of women there was overwhelming

consensus that "women's development is characterized by multiple patterns, role discontinuities, and a need to maintain a 'fluid' sense of self" (Caffarella & Olson, 1993, p. 143). In that review the importance of both relationships and competence were cited as vital to the process of development.

Continuity and Change. I didn't understand her desires that day, or how they had contributed to her overall identity, but I knew enough to ask for more clarity. I was curious just how much change she would welcome in her life. I asked, "Do you think of yourself as more excited about change, or are you one that's more excited about continuity?" I admit my question was spawned from some of the theories mentioned above, but specifically the issue of continuity and change in adult development. She said:

> I think I've always had a play of those two. I'm not a risk-taker. My life has been fairly conservative. I've been married to the same man for almost 18 years, been in banking for almost 20 years . . . I have continuity in marriage, and the continuity of a great family, and I think that baseline may make me able to give a twist to my career. Maybe that's the piece that I need to stir up.

Josselson (1996b) says, "Life is lived multidimensionally and involves both continuity and change that cannot be told simultaneously" (p. 14). A discussion of continuity and change would not be complete without including theorist Robert Atchley (1989, 1999). His use of the continuity theory of normal aging exhaustively studies the notion of both internal and external continuity and discontinuity over the life span. In the

narrative above Ann shares the continuity and security she feels in her marriage and her family of origin; these are examples of her sense of "external continuity" as defined by Atchley. He continues, "This continuity is not a boring sameness for most but rather a comforting routine and familiar sense of direction" (Atchley, 1989, p. 188). When Ann suggests that she should "stir up" her career it appears at face value to be a shift in her external continuity, but upon closer analysis, I believe she is actually exploring her self and identity, which Atchley defines as the dynamics of internal continuity. I claim this because Ann is satisfied with her life as a whole; she is expressing in earlier narratives ambivalence about the remainder of her life and whether or not she wants it to look like the part she's already lived. Atchley explains, "By late middle age, many people's life experiences stimulate an interest in going beyond the traditional social sources of life meaning to discover more enduring sources" (1999, p. 141). To me, Ann's thoughts sound like an internal dialogue seeking enduring meaning in life, versus an external shifting of relationships and experiences.

I'm Walking Away

When Ann told me she was walking away from her position she was reporting to me something that had already happened. She didn't come to our conversation to explore the idea of leaving her position, or to assess the pros and cons of different career options, she came to our lunch meeting to share big news. The mental, physical, emotional, and spiritual journey she took to reach this decision had crossed over the finish line and she wanted to tell

me that day the results and how she had trained for the "race," participated in the "race," and what new "races" she was planning to join. She even used the metaphor of a marathon to describe the decision-making process.

I said, "You've already quit haven't you? Even though you have several months to go, you're mentally done aren't you?"

"Yes, I am," she agreed. "It feels a little like a marathon. I've gotten through the 'wall' and now I'm just enduring until the end of the race. I feel like I'm leading a little bit of a double life, and my real life is on hold."

What does the "wall" look or feel like as individuals face life transitions? What kind of knothole do they go through? Are these transitions a result of expectant maturity, or are they a result of unsettling personal reflection followed by a correction in behaviors?
How can this be discerned? Ann's story ends up being one of planned transition. But her decision to leave a large, secure organization and a lucrative income is non-normative and off-time by most people's ways of thinking. What theoretical framework for adult development best describes this transition and shift in identity?

In my opinion there are two philosophical vantage points from an adult development perspective that will make this discussion interesting and perplexing. In the discipline of adult education, the first has been developed and fostered by Mezirow (1990, 1991, 1994, 1995, 1996, 1998, 2000). His development of transformative learning theory has dominated adult education literature since the early 1980s. The second philosophical vantage point is actually a reaction to Mezirow's theories and is promoted by Tennant (1994) and Tennant

and Pogson (1995). The latter questions adult development changes that are quickly labeled as transformative, when in their opinion it may more readily be explained by socially constructed, somewhat predictable movement through the life course.

Adult Development as Normal Maturity. Suffice it to say, the analysis of any adult's life changes are always complex and difficult to correctly determine the exact causes. However, for the purposes of a thoughtful exploration of developmental theories, I will proceed. Tennant and Pogson (1995) and Tennant (1994), question the motives around adult life course changes. Their belief is that the life course is a basic social institution; it shapes our world. The primary way that it shapes our world is the meaning we give to age appropriate activities. For instance, as a society we set up agreed upon constructs around what each gender's behavior should or should not be. In the same fashion, we set up agreed upon, socially constructed ideas, about what age appropriate behavior should, or should not be.

Tennant and Pogson (1995) posit that, except for the very young and the very old, there is very little evidence for a direct connection between chronological age and the constraints imposed by our society on what is appropriate at any given age or phase of life. They would add that these socially constructed age constructs actually limit and constrain adults' possibilities across the life span. Tennant and Pogson might say that Ann has been working in the same industry for 20 years, she has for all practical purposes mastered her career, and for her to continue meaningful growth in her life why wouldn't she want to move on to a more fulfilling developmental phase? In promoting this idea they would also be

saying that Ann did not experience a dramatic shift in her way of looking at her life and herself (Mezirow's theory of transformation), she's simply writing her own rules about life course development.

Transformative Learning Theory. The second developmental vantage point would be the influence of Mezirow (1990, 1991, 1994, 1995, 1996, 1998, 2000). Acting on the advice of colleagues, Mezirow recently modified the terms he uses to describe key elements of transformation theory. I will introduce those updated terms and continue with my discussion. The broad, generalized views we have of our world--like our worldview, the culture we live in, patterns of family life, often deeply held assumptions we have that we may not even be unaware--were originally termed meaning perspectives. Mezirow has renamed this our "frame of reference." He now suggests that "frame of reference" is composed of two dimensions. These are "a habit of mind" that leads to a resulting "point of view." The latter, point of view, was Mezirow's original "meaning schemes." A habit of mind Mezirow describes as the unique personality characteristics adults hold; for instance, being confident or fearful; approaching a problem intiuitively or analytically; having an outgoing or a introverted personality. The resuting behavior from those habits of the mind, is expressed in our point of view.

Until recently, Mezirow gave credence to the notion that transformative learning is most often set into motion by a disorienting dilemma, followed by critical reflection on that dilemma, resulting in a change in behavior and actions. Over the years Mezirow and others have shifted their beliefs on this. Clark (1993) points out in her critique of transformation

theory that "integrating circumstances" could also set into motion a perspective transformation. She describes this as "an indefinite period in which the person consciously or unconsciously searches for something which is missing in their life; when they find this 'missing piece,' the transformational learning process is catalyzed" (p. 81). Daloz (2000) in his report on the transformative dimensions of Nelson Mandela's life, and referencing his work in Common Fire (Daloz, et al., 1996), states firmly that it is more likely there are many, often unremembered events leading to a steady, culmulative transformation. He cautions:

> Although a single event may catalyze a shift, or a particular story might dramatize a transformation, closer examination reveals that change or shift was long in coming and its possibility prepared for in myriad ways, generally across years. We found no instance of transformation as the result of an isolated, epochal event. Indeed, the idea that profound change can occur literally out of the blue flies in the face of everything we know about human development. (Daloz, 2000, p. 106)

Mezirow and his colleagues have recently pointed out that they, too, see an expanded view of the nature of transformative learning. Transformative learning may now have characteristics of "epochal transformations," those that occur suddenly, and "cumulative transformation," those that unfold over time. If Ann's development has been transformative, it has certainly been a cumulative transformation. I think I could press Ann into recovering more of the unremembered events that may have contributed to her decisions, but one that she did share with me came many years before we began to meet. She said that her most

trusted, and admired sister startled her one day by saying, "Ann, you've lost your sense of humor." Ann has never forgot that conversation. As she probed, her sister told her that she was serious all the time, totally-consumed by her work, and unavailable for activities that she had always attended, and she was unable to laugh about anything. Her sister told her, "When I talk to you everything is either life or death." Ann told me on more than one occasion the staggering effect her sister's words had on her. This, to me, is an example of a pivotal event that, when combined with other experiences, contributes to a cumulative transformation.

Reflection. During my years with Ann, and now upon focused study of her developmental process, I admit to shifting allegiances regarding the theories presented by Mezirow (1990, 1991, 1994, 1995, 1996, 1998, 2000) and Tennant and Pogson (1995). I could hear and observe Ann's integration of multiple roles and desires in her life. I resonated with her desire to have more time to herself and sort out what she wanted to do with the rest of her life. This sounded like mature normative development of a woman in midlife. But I also recognize that the significant amount of time we spent together, during which I asked her thoughtful, probing questions about the meaning of her life, was fundamentally powerful in her process of critical reflection which gave way to behavioral change and a dramatic shift in her meaning structures. Our dialogue was a factor in her exploration of new points of view, habits of mind, and ultimately a different frame of reference in her life. Bloom (1998) sees this kind of exploration as positive, and reflective of the fragmented, multiple, nonunitary subjectivities of females. Friere (1970) originally called this "conscientization," Schön (1983) continued theorizing the notion of "reflection-in-action," Brookfield (1987, 2000) contributed

much to the steps involved in critical reflection, Argyris (1993) framed this learning as a gap between "espoused theories" (beliefs) and "theories-in-use" (actions)," and Belenky et al. (1986, pp. 143-146) simply use the term, "really talking." In each of these contributions to an understanding of transformative learning, verbalization is the fundamental component to development.

I did not set out to establish a transformative learning experience with Ann. My methods were never designed to fit Mezirow's theory. However, in hindsight the process does have similarities, especially that the dialogue gave way to new understandings and subsequent actions that validate that Ann is in a new developmental place than she was five years ago. Both her "point of view" and her "frame of reference" have been reshaped. In a related discovery, Merriam and Clark (1991) found in their analysis of the significant learning experiences of adults over their lifetimes, that what constituted significant learning were those experiences that expanded adults' skills and abilities, their sense of self, or their life perspective. If their life perspective had been changed, this precipitated a transformation of the whole person (pp. 203-205). Transformation theory contributes, then, to my ultimate assessment that what I experienced with Ann is best represented by the theory of adult development as narrative, which integrates the socially constructed theory of Tennant with the transformative learning theory of Mezirow. The narrative theory of development will be discussed more completely as a conclusion to this chapter.

I Told Everyone!

Ann left a message at my home office at 6:30 p.m. on a Friday evening. She spoke in a somewhat hushed, yet upbeat tone, saying she was anxious to talk to me. On Monday I learned she had formally announced her resignation. There were two main themes in Ann's comments to me today. First, she uses the word "choice" over and over.

> I know that I am fortunate in being able to make this kind of career choice. I see others as having this choice too, but as I listen to them, I realize that most others don't see that they have a choice. People put a lot on themselves about what they can and cannot do.

The second theme I heard was a new story from her about her professional career and the advantages of being what I will call the Chief Executive Officer (CEO) of You. She outlined for me many of the reasons it is a good time to work independently. She mentioned that more and more professionals are being drawn to project-based work versus being long-time employees; she believes there will be more hiring for expertise or consulting-based work; she describes her desire to create work together with other people. These are growing workplace trends, some of which Ann and I may have discussed during our time together. What was interesting to me, is that they were today her ideas, something that she understands and promotes.

In both of these themes, seeing her decision to leave as "choice," and describing her new paradigm for work, I still hear the same confidence in her voice that I have always heard. But I also hear an excited, shout-at-the-top-of-your-lungs, freedom. I notice she's opening

new windows of learning, and then embracing what she discovers. For instance, I now hear her evaluating the conversations of others in the workplace. She is noticing the language of "exceptionals" and "biologicals" that I have shared with her and presented in Chapter One of this study. She can detect stories people tell about their workplace situations that describe entrapment, like the number of years they are sentenced to serve in the organization until parole, they tell stories that suggest they have no choice but to stay. She can hear when others box themselves into careers and lifestyles that they believe have no exit. What Ann hears others, and perhaps once herself, describing are the external trappings of life, when really the business of authenticity in life and wholeness is discovered through the internal trappings of life.

Through her own verbalization with me, much conversation with her husband, and likely many phone calls and visits with her closest friends, she began wrestling with the internal trappings of her life, not the external trappings, though at face value it may seem just the opposite. Consistent with the theories of women's development and identity, Ann was discovering her own desire to live with greater wholeness. Once she discovered what she was missing, I believe it was very easy for her to let go of the external trappings, specifically her high profile leadership position and responsibilities.

Parker Palmer (2000) in his book, Let Your Life Speak: Listening for the Voice of Vocation, describes the journey to authenticity that I think Ann has been on.

He says:

> It is so much easier to deal with the external world, to spend our lives manipulating material and institutions and other people instead of dealing with our own souls. We like to talk about the outer world as if it were infinitely complex and demanding, but it is a cakewalk compared to the labyrinth of our inner lives! (p. 82)

Palmer's own journey took years and was not always easy. But he would be quick to say that grappling with the complex internal landscape of his life propelled him into a deeper meaning of life. This is where I, too, see Ann going.

David Whyte (1994), a critic on corporate America, says, "At midlife, a man or woman feels an inner siren call like an old memory. No matter how long and how faithfully we have served (the corporation), we suddenly remember our former intuitions for a possible life" (p. 185). This is what I see in Ann. I don't believe she will become the President of her own business, nor do I believe she will take on project-based work in the financial industry. I believe that she will shape and create a life that folds her passion for the people she cares the most about, with her competence and energy in yet undiscovered ways. Her developmental story is still unfolding. Whyte's thoughts on meaning at midlife are especially pertinent:

> We take the road at midlife not as the beginning of disengagement and retirement but as a newer and profounder path to meaningful work, the work of belonging in a deeper way to those people and things we have learned to love. The task of midlife is the task of finding the difficult, often dangerous

road to this eldership of love. It becomes, for all of us, the road worth taking, the road back home. (p. 210)

Two Weeks Since I Told Everyone

I met Ann at her office, we went for the first time to her home where we shared a couple glasses of wine, and then went out for dinner. At the time we never framed the evening as such, but frankly, it was a celebration between the two of us in honor of her public notice that she is changing. There was excitement at her office when I arrived, and an absolutely beautiful arrangement of wild flowers on the table where we normally met. They were from a customer of 20 years saying, "thank you and goodbye." My mouth dropped open seeing them, and without thinking I stated, "It's like it's your funeral!" She agreed, we laughed, and we both felt overwhelmed and excited. The mood that evening was similar to other celebrations, like a career promotion, or acceptance to a graduate program of choice, the announcement of becoming parents, all good things that deserve celebration. This celebration felt the same.

For me that evening, I couldn't deny the slight feeling of having been involved in a covert operation that no one else knew about. Ann thanked me more times than I can count for my contributions to her decision. She is obviously very, very satisfied with her decision to leave the organization. During times of celebration, the guest of honor often has the floor to share their accomplishments with others, this night Ann was being honored. She was more comfortable talking about her accomplishments and a little less polished with me. It seemed

she was starting to let go of some of the expectations she put on herself. She also moved, without apology, through a full range of thoughts related to her developmental journey. I asked her if she thought what she was going through was "transformative?"

> I feel like I'm in the middle of something, but I can't tell you a single incident that's transforming. I feel like I've been on a journey of readjustment for some time. I think when I get farther down the line, or through it, I might be better able to look back at this. Right now I don't completely know what's happening, except that I'm learning and adjusting and changing, and it feels very, very good.

What Ann is describing is her own interpretative experience of her life changing. It is not a clear picture at this time. Ann's journey at this point looks a little like boarding a cruise ship, excited about the prospects of warm weather, new surroundings, and new adventures, but disinterest in the ship's destinations. Rossiter (1999b) explains that self-interpretation is not something determined once and for all time. Cohler (1982) also points out that lives change over time and they do so in ways that are not predicatable. Polkinghorne (1988) also explains:

> The realization of self as a narrative in process serves to gather together what one has been, in order to imagine what one will be, and to judge whether this is what one wants to become. Life is not merely a story text: life is lived, and the story is told. The life story is a redescription of the lived life and a means

> to integrate the aspects of the self. . . the story about life is open to editing and revision. It can be changed. (p. 154)

Ann is using words which exemplify this story-in-progress. "I feel like I'm in the middle of something;" "I feel like I've been on a journey for some time," and "Right now I don't completely know what's happening." She is able to reflect on the process she is experiencing. Kolb (1984) calls this "reflection-on-action." Other scholars, Boud, Keogh, and Walker (1985, 1996, as cited in Merriam and Clark, 1999) have added to Kolb's work on reflection-on-action by suggesting that we must attend to the feelings created during the process for learning to be most effective. In this example, the action Ann is reflecting on is a journey in process. I expect that her reflection on this journey embeds the learning experience more meaningfully.

Four Weeks After Leaving

"It's definitely been a good decision, I don't have any doubts about that," Ann assures me when I check in with her four weeks after she resigned her position as President of Norwest/Wells Fargo in Des Moines. But she says more, "Initially I wasn't very comfortable with myself. I wondered, 'Did I cut off my nose to spite my face?' It wasn't a panicky feeling, just a question." As I reflect on the sound of her familiar voice I'm wondering, is she trying to convince herself? She is confessing some measure of self-doubt in her decision. She doesn't sound quite as sure of herself as she usually does. She is also now spending a lot of time alone and can process the full range of her thoughts.

I was curious if she too deals with the nonstop mental assessments which I constantly live with, so I simply asked, "Do you feel like you live in your head all day?" With the utmost enthusiasm, as if I had completely understood her, she responded, "Yes!" Speaking very fast, she continued, "I find myself thinking about my whole life, events, history, much more history than future." And then, as if she actually slips into her self talk, she explains, "I'm mentally on hold on what I'm going to do. . . . People are so accustomed to me being hard charging . . . and I just don't know what I'm going to do."

As I listened carefully to her I could hear her being torn in her options, maybe even enjoying the complete absence of work; and then comparing that to the expectations of others who expect her to start her own business and continue to build upon her professional career. How does she assess her decisions and options? What is it really like to "live in your head all day" when you are experiencing the kind of life transition Ann is experiencing? Michele Bolton (2000) describes this phenomenon of "living in your head" as something every women experiences and she names it our "third shift."

Writing at length about what she names the third shift, Michele Bolton (2000) explains that women work a first shift in the workplace. They then tend to the needs of their families, communities, and homes for a second shift. Arlie Hochschild (1989) exposed the second shift women experience in an exhausting home life after a full day at work, in her book, The Second Shift. The third shift that Bolton describes is an on-going, non-stop inner dialogue with the self that may be experienced by women during both the first and second shift, or it may be experienced at the end of the day when the other two shifts are finished.

Bolton says there are twin voices in the third shift: one is negative and casts self-doubt, the other is positive and encourages self-awareness. The first and second shifts are literal experiences, the third shift is psychological and it focuses on the "universal difficulty of choosing wisely and remaining satisfied with our personal life choices as contemporary women" (p. 2). The third shift, in her opinion, is exclusively a female phenomenon. Based on the oral histories of 117 working women, Bolton discovered that during this third shift the psychological focus was on the three major tensions that women face.

The first tension is an identity challenge. The tension in this challenge is between expressing yourself as you really are versus trying to be who others expect you to be. The second challenge is the task challenge. This tension is between getting a job done versus worrying about how everyone feels. The third challenge is one of balance. This tension is between spending time on personal achievement versus service to others. "The trick," says Bolton, "is to use the third shift productively to develop our true identities, rather than let it mire us in the quicksand of confusion and guilt" (p. 28). I want to use the first of these three third shift challenges to examine Ann's overall decision and specifically the narrative shared in this section.

The identity challenge Ann faced was primarily in the workplace. I believe that for most of the years Ann was working professionally there was unity between the way she identified herself and, for the most part, the way her primarily male peers identified her. There was not tension between who she wanted to be and who others expected her to be. By and large, she was experiencing harmony between achievement and service to others. Only

during the last couple of years do I believe that Ann began to feel a sense of lost harmony and a desire to define achievement in new ways that were not going to be possible inside corporate America as she knew it. The third shift voice of self-awareness is at first present in the narrative above when she says, "I don't have any doubts, it's been a good decision." Then within the same narrative she slips into a third shift voice of self-doubt and says, "Did I cut off my nose to spite my face?" She isn't able to sustain the more positive voice of the third shift reflection on her decision.

Bolton (2000) had women in her study moving through similar developmental decisions as Ann. These women's ultimate choices are worthy of mention. Bolton says:

> Women in midlife who have attained career achievements consistent with [or beyond] their expectations may need little or no approbation from others. My sample includes several such women who have radically down-shifted to lower-prestige community service work or quieter at-home existences after several decades of fast-lane corporate life. (p. 301)

More than once Ann told me that "achievement" was not the motivating influence to her current and future decisions. She explained rather frankly, that "she'd done that" and reputation, power, and public recognition of any type of career status was not motivating to her. I believe this, she said it many times. It would not surprise me to see Ann engage in very different work and service in the years to come.

Bolton's final plea to women also corresponds with Ann's journey as I see it. She said that when she developed the conceptual framework for the third shift she "wanted to

help women rediscover the harmony that makes life such a wonderful and exciting gift" (p. 308). She goes on to explain that a "woman's third shift can be a refreshing oasis from the cacophony of the outer life" (p. 309). The harmony she encourages women to seek comes from making life and career choices on the outside that result in harmony on the inside, inner oasis, or third shift. She believes that female "progress without psychological liberty is no freedom at all. It is instead a little death of ourselves and ultimately those we love" (p. 310). Ann would not be able to articulate this today, but I wonder if she will tell a similar story in the future?

Six Months After Leaving and Her Last Story with Me

"I see myself as someone who is a whole lot more relaxed and comfortable in my own skin. I've given a lot of thought to what I've done, where I've been, to some lesser degree, where I want to go," says Ann Wagner-Hauser. "I promised myself that I'd take six months to not think about the future and I've been true to that. . . . I don't feel I need to define that yet."

It's been six months since Ann Wagner-Hauser was honored by colleagues and friends in a farewell celebration and tribute for her almost 20 years in leadership with Norwest/Wells Fargo banking conglomerate. She was one of a handful of women in the highest levels of that organization's leadership in the state. Life is different now, much different. She often uses the word, "freeing," to describe her thought life, her time, and her energies. She looks more relaxed, even prettier than before, and even more likable. There is a contagious, good feeling

that comes from being around someone that likes themselves. Her mental, physical, and spiritual journey can perhaps be understood by looking at how she's spending her time. She would be the first to acknowledge, and I would collude, that her choices do reflect white, upper-class privilege and a fair amount of luxury.

Her Choices. Ann is choosing to manage their two homes; one on a lake near the Twin Cities, the other in Des Moines. She has accompanied her husband on a least one major business trip to Australia. At the marina near their lake home she began investigating the possibilities of restoring a 1960s Chris-Craft wooden boat that she and her husband own. Her queries into restoration led her to new people, new learning, and new challenges. With help from a mentor at the marina she began taking on the task of restoring the boat herself. But she is restoring more than just a boat; I think she's restoring her soul.

> The group at the marina get the biggest charge out of me. . . . I think they probably thought I'd be there a day or two and then I'd be home. I didn't set out to prove anything to anybody, but that's kind of been a by-product that's come along. . . . There is just one word to describe the hours restoring this boat, "wonderful." I get to go at my own pace, to think, to not have anybody coming at me. I find myself thinking back to childhood, to work experiences, to what I want to ponder, and liking what I see and where I am in life. I'm out of my comfort zone and it's not a disaster, it's not frightening. . . it's kind of exhilarating! . . . I just didn't know how I was going to handle this time. But I

have found great joy in solitude with myself and I have found that I can enjoy my own company.

This narrative is one of transition, but it's also an example of positive "third shift" thinking as described earlier by Bolton (2000). Ann is experiencing transition. She's in-between, in some respects, a life she had known since college and journeying somewhere new. Bridges (1980) describes the phases of transition as endings, the neutral zone, and new beginnings. He even suggests six months to assess where you've been and where you want to go. The apparent comfort Ann is feeling with herself I believe is a result of learning, versus passive hours spent sanding the bottom of an old boat. Merriam and Clark (1991) in their research on work and love found that it is in the interaction of work and love that learning occurs. Thus is the case with Ann. "Work and love are the major arenas of adult life. They form the basis of our identity and they organize how we relate to the world" (p. 218).

Her Identity. Transitioning from a demanding professional work environment to the absence of the same, sets Ann up for some new learning experiences in her own home as well. One such experience caught her completely by surprise. In this situation I see her identity as a woman becoming more complex, something I quietly saw coming and have experienced myself. Ann and her husband chose to host a bar-b-que for his closest business colleagues, one of which was from Australia and had been a great host to them during their recent travels. It was not their custom to entertain in their home when Ann was working. They normally ate out. Ann recalls thinking, "These were all the people that my husband really likes and that I also really like, so this better come off darn good."

The surprise came the night before the bar-b-que when Ann awoke at 2 a.m., because of the exact same physical stress she would feel when she was, using her words, "maxed out at work." She vividly explains:

> I realized how hilarious this was! I'm worried about bar-b-ques, fricking bar-b-ques! (She's laughing a lot) Instead of board meetings, this was elevated to equal importance in my life . . . and standing . . . and it needed to go off well! I guess it's all relative isn't it?

So to the question of her identity in that situation, I wanted to know, "Are you comfortable with the role of 'spouse?'"

> I don't know, I honestly don't know. (She is talking slowly and carefully) It was my first time stepping out in that role. I didn't like it, but it didn't make me mad either. I think it just bothered me a little bit. I mean, what would the reaction be, what would the story be? . . . I think if truth be told . . . unless people worked with me closely and knew this was a personal decision . . . it doesn't make sense to them. Why would someone leave a perfectly good job that she appeared to be doing relatively well?

Ann does not hang on those questions. She will tell you that she thinks about what others say, and she would correct any false information she heard, but this is not a worry that she dwells on. But what about Ann's shifting role as a women? And her incomplete answer to my question, are you comfortable with your role as a spouse?

The issue Ann is describing through the story of hosting a bar-b-que at her home is an issue of identity. Frankly, I have asked Ann about her sense of shifting identity several times since she told me she was walking away from her easy-to-understand identity as President of a bank. I keep thinking that she will feel a sense of loss. This day was the first that she revealed any new dilemmas in her role and identity as a woman. I believe there will be many more. Josselson (1996b) points out:

> Regardless of what sort of path a woman travels . . . she will have to discover along the way her "competence," the regions where she can be effective and do things of value, and her "connection," the people whom she chooses to make important in her life. (p. 179)

Josselson (1996b) thoroughly examines the experience of female identity in the domains of competence and connection, or as others have called these characteristics: work and love, or achievement and service. As others who have studied female adult development also conclude, women do not relegate competence to just their role at work, rather they see opportunities to display competence in the multiple roles in their lives, i.e., mother, spouse, daughter, friend, school volunteer or Sunday school teacher. This is unlike men who often see competence as synonymous with only their work identity. This being said, and staying with the example of the bar-b-que, is it possible that Ann may begin to explore how competent she desires to be as a hostess, or in the role of "CEO of Social Functions?" This may sound flip, but that is not my intention. Let me explain.

There is much that has been written over the years about female identity and the social construction of femininity. Generally speaking the literature supports that femininity, as compared to masculinity, remains the lesser virtue. Mulqueen (1992) firmly points out that femininity is socially constructed and lacks clear definitions to this day; and generally speaking, it is devalued compared to masculine identities. Bloom's (1998) research supports this claim as well. She found that one of her feminist respondents clearly distinguished stereotypically female roles, such as grocery shopping, housework, and cleaning, from the stereotypically masculine role of working hard and advancing one's career. The respondent was able to articulate that female tasks were considered to be of lesser value than male tasks. Similarly, as the CEO of Social Functions, Ann would be taking on a feminine role that she too knows is socially constructed to be of lesser value than the masculine role of her husband. Ann's identity prior to leaving the organization was a socially constructed masculine role and was highly valued. Despite what Ann may understand today, the masculine and feminine characteristics of her identity are shifting and changing as they are socially constructed in our society.

Connection, as mentioned above, is a primary characteristic of female identity. Josselson (1996b) defines connection as "a form of belonging, of embedding the self with others" (p. 210). Identity for women is an ongoing process of respecting others' needs and your own needs at the same time. Josselson says that "psychological growth in connection involves finding more interesting and challenging ways of being with others, knowing them better, and simultaneously knowing oneself better" (p. 210). Because a woman's desire is so

often to embed him or herself in the lives of those they love and to create unity among those closest to them, Ann's identity is also shifting and changing as it relates to her understanding of, and implementation of competence and connection. Josselson said that the women in her study "found important expression of their competence in domestic activities" (p. 205). Can Ann be both competent and connected? What will that look like? Will it be valued?

To complement this discussion, I must admit to my own difficulty in this regard. As the years have passed to complete my doctoral studies I have chosen to increasingly limit my professional commitments. My identity as a former faculty member and respectable business consultant has waned and I have less clarity in what it is that I do with respect to achievement and competence. During this final session with Ann, she generally believes her sense of identity is a non-issue in her life. But she did add, "When people ask me 'what do you do' I don't know what to say!" I have several years of experience navigating this question and I still feel uncomfortable with the words that come out of my mouth.

In Western society it is a socially constructed "good thing" to hold organizational positions of influence. We evaluate worth and reputation by the occupations people hold. Though many female adult development researchers overwhelmingly testify to the dual characteristics of competence and connection in female identity, it is my experience that connection is much more difficult to describe, and is generally devalued even if it is carried off with superb competence. Is this the cultural framework of male identity that continues to haunt female experience as being "other?" Is this the "third shift" of my own mind scattering self-doubt on my life choices? What will Ann do in the months and years ahead? As Ann

composes her own experience of identity how will her issues of competence and connection unfold?

In the experience of leaving formal work environments, Ann's story and my story are probably different. Over the last year Ann and I met we began to compare my story about her overall experience of development, transition, and identity, with her own story. The differences in the stories we each want to tell begins the narrative portion of this chapter analyzing our process of working together. The first section will be "Her Story or My Story?" the second section will be is "Friendship or Relationship?" and the last, "Therapy or Listening?" In each of these sections the titles suggest our possible differences in viewpoint.

Narratives of Process

Her Story or My Story?

When I shared with Ann Wagner-Hauser the first draft of her life history, presented in Part I, Life Stories of Leaders, in this study, I asked, "Do you feel like I've told your story?" She enthusiastically replied, "Yes! Absolutely. I thought it was really, really well done. There's really not anything I would change." Denzin (1994) calls "making sense of what has been learned the art of interpretation" (p. 500). My task in this research study, and specifically in this chapter, was to make sense of Ann Wagner-Hauser's life: her transition, identity, and learning. Denzin points out that the interpretative writing that I have done is like fiction. I was given the facts of her experiences and I listened to many ideas about what might be, or not, in her life. Through my eyes only I made sense of those observations and

experiences and weaved together the fabric of her journey. This is Ann's story. However, my voice and my life have also been apparent. In this section, Her Story or My Story, I will reveal another layer of interpretation that was purposefully detained so that Ann's story would have the best opportunity to be heard.

My Story. I chose to leave private industry in my mid-twenties because I felt I wasn't making a difference. I found the singular focus on productivity for the enhancement of the bottom line to be meaningless to me. I felt the wholeness of my life compartmentalized by the structure of an organization. During my thirties the opportunity as a private consultant to move in and out of a variety of profit and non-profit organizations confirmed, in my opinion, that adults largely put up with workplace environments that are not good for their overall development. I sought to share that insight with others and "enlighten" them when the opportunities presented themselves.

Her Story. Ann is very proud of her tenure and former position of leadership in the corporate world.

> It is my history, I wouldn't be where I am today if it wasn't for my work experiences. . . . I don't have anything bad to say about corporate America. It's a great place to learn. I worked for great people who held high principles, and an organization that did the same. . . . I think some people would look at all of my work experience and say, "you trashed all this?" And I would say, "no, I lived all this. It's not gone. It's moving on". . . . I know it's hard to

make a difference in a large organization, but it's not all bad. I had wonderful times. I enjoyed every bit of it. But time is becoming more precious to me.

My Story. I want to tell a story of David (Ann) facing off against Goliath (the organization). I want to paint a heroic picture of Ann standing up against a foe 100 times her size and strength and with a temperament of "I told you so," say to Goliath, "I'm walking away!" I want to tell this story because I feel so strongly that many organizations have a soul-sucking grip on adult lives. As Fraser (2000) and Whyte (1994) poignantly point out in their own research and from their own corporate experiences, organizations do hold a tight grip on their people. Bloom (1998) points out that women's desire to tell a heroic tale is understandable. She explains that the only tale of heroism women may know how to tell "reproduces the classical story of the hero's journey, a master narrative of male success" (p. 73). Given that there really are no models for females conquering organizational holds on their lives, we then chose the only tale we've ever seen scripted. What would a female tale of heroism in this situation look like? In the male master narrative, I want to end Ann's heroic story by depicting her narrowly escaping the shackles of huge salaries, stock options, and leadership perks that were sure to stomp out her creativity, sense of integrity, and crush her desire to learn for the rest of her days. But this is not Ann's story. I have shared this plot line with her and she explains her story again to me, which I respect. Ann is crafting a tale of female heroism, a female master narrative, this is instructive to me.

Her Story. "If I told the story you want to tell, it would totally diminish everything that's me. I understand your story," she says to me, "because now as I talk to other people I

am tempted to tell them what to do with their lives. But like you did for me, I need to give people their own voice and allow them to carry through on their own."

My Story. In these comments from Ann I am humbled and silenced as a researcher. I am reminded that we have lived different lives. Though I am certain that my life had influence on hers, it is inappropriate for me to make my story hers, or her story mine. Because Ann's life so dramatically changed over the years we were together and because she made choices that were so impressive to me and my way of thinking and living, I wanted to make her story and the meaning of her life, a copy of my story and the meaning of my life. Bateson (2000) cautions, "If you want people to change their minds, you have to address them as minds in motion. . . . There is a huge gap between offering the gift of an idea and claiming ownership of the mind of another" (p. 236). I have the utmost respect for Ann's story and the meaning of her life, as I have the utmost respect for my own story and the meaning of my life. But they are not the same.

Friendship or Relationship?

I was introduced to Ann through a mutual friend and business colleague. I did not know at the time that he and Ann were exceptionally close professional friends who talked to each other regularly and supported each others' professional careers to the fullest extent possible. During our meetings together I once asked Ann why she agreed to participate in my study. She said, "I think because Jeff asked. . . . I like and respect him and your work sounded intriguing, not only for myself, but from the standpoint of what others could learn

from it." The purpose of this section of narrative analysis is to assess whether Ann and I experienced friendship, or a professional relationship.

Ann's connection to Jeff was a very close friendship that had spanned many years. My connection to Jeff was more distant. Jeff and I were both involved in board leadership of the local YMCA, we attended the same church, and our professional paths regularly crossed. In my opinion, though there was mutual respect and perhaps mutual admiration, my connection with Jeff was primarily a professional relationship. I believe if you were to ask Ann about her connection to me during our time together, and especially during the last year, she would say that we are "friends." If I were to be asked the same question, my response would be, "we have a close working relationship." I posit here that the history of our independent connections to Jeff may have established expectations for our connection and interaction with each other.

Relationship. During the first several years I met with Ann we did so at her corporate office. Make no mistake about it, there was a clear physical sense contributed to by the decor, furnishings, and multiple layers of assistants and locked doors, that this was a high-level environment. Our first meeting she took me to an executive cafe atop a high-rise office building. You could see for miles. I wanted to comment on the view, but resisted so she would think that I'm often in these settings. The fact is, I have had a respectable business career and have endured extensive business lodging and entertainment, so this was not an unfamiliar experience. But because I was in a position to need her time and story, I felt much less certain of myself. The field notes I recorded after meeting with Ann more than

once noted that "Ann looked outstanding today." Accompanied by, "I always feel a little dowdy when I'm around Ann. . . . She's tall which makes me feel especially short. And I'm 5 ft 6 in! The distance I feel between us seems to translate into some kind of misguided purpose in my life!"

Friendship. Ann always seemed enthusiastic about meeting with me. The first couple times we met I heard the majority of her life stories that were most significant. I know that I sat fully attentive and engaged in her conversation and that I was moved by the similarity of many of our experiences as females growing up determined and full of a desire to succeed. Bloom (1998) would describe our interactions as "polite social discourse" in that we both understood our roles. Ann's role was to talk and provide good stories about her life; my role was to listen attentively and by-and-large, without interruption. I do not fault either of us for this type of discourse, it was in fact what I requested and received. I believe it is also what Ann expected and received. I am in a better position now to analyze the roles Ann and I assumed.

Bloom (1998) discusses the feminist researchers' call for a kind of "sisterhood" to develop between the researcher and the participant to the point that the two have "profound positive relations and shared interests" (citing Cotterill, 1992, p. 265). I did not approach Ann with the goal of sisterhood. I approached Ann with the only kind of interviewing experience I knew, which was what Bloom called, polite social communication. Bloom says that polite social communication is largely characterized by turn-taking which includes "empathetic listening and creating a relationship through personal disclosure" (p. 30). This is

exactly what happened. As there were opportunities for Ann to disclose and for me to honestly offer feedback from my own life, I would do so. As a point of reference, Bloom implies that communication which is limited to only talking about events and things is polite male communication. That, too, was my experience in this study. With the female participants we disclosed portions of our personal lives. With the male participant, we revealed very limited personal information.

During the first four interviews I had with Ann I used a small tape recorder to record the text of our conversations. Without exception, when I would turn off the tape recorder, I could feel Ann shift into conversation that felt more candid, more relaxed, and more familiar to what two friends share. At that time, she would often ask me questions, and then listen attentively, being equally as engaged in my contributions as I was with her contributions to me. Toward the end of only our second meeting, she said, "It would be fun to get together with just our blue jeans on." I interpreted this to mean that she liked me, she wanted to spend more time with me, and that she thought we would enjoy each others' company apart from our predetermined agenda when we meet. I fully agree. And over time, we did move to more casual, interactive conversations.

Relationship. Prior to meeting with any of the elites in this study I studied the experience of "researching up." Researching up, as the name implies, reflects the perceived position of the researcher to the respondent. Several scholars have written about this experience and I was fully prepared to apply what I had learned (Barone, 1995; Goffman, 1959; Gurney, 1991; Hertz & Imber, 1995; Hirsch, 1995; Nader, 1969; Ostrander, 1993;

Thomas, 1995). The themes from that literature review were (a) to "be like the elite" as much as possible; (b) to keep the focus on the elite and use their time wisely, (c) to work in as professional a manner as they are accustomed, and (d) to be respectfully suspicious that what they are telling you is persuasive in nature. It is this last point, being respectfully suspicious, that I want to focus.

I have said repeatedly that Ann was authentic, sincere, and a joy to work with, which is completely so. However, my personal framework for understanding and listening to the stories of lives told, even my own, is replete with the notion that as adults we tell stories that "sell ourselves" to our listeners. This is not necessarily bad, it is just so. Barone (1995) explains that elites "perform" as a function of their position. High level leaders are accustomed to being listened to often without questioning. Narrative inquiry as a whole also includes criticism of people telling persuasive stories about themselves. Ochberg (1997) says "that the stories people tell about themselves are not merely descriptions but efforts at persuasion" (p. 97). The story tellers want to see themselves as "coherent, dedicated, triumphant" but Ochberg suggests that as researchers we should be listening for a quiet subtext that is not articulated.

The juxtaposition I found myself in during the interviewing process was like walking some kind of tightrope between being Ann's friend and supporting her fully, and being a researcher listening carefully for unspoken subtext. Becker (1967) says that we must always look at the situation from someone's point of view. "We can never avoid taking sides," he claims (p. 245). However, when we "take sides" Becker says that we also introduce some

kind of distortion to our work. I believe that my connection to Ann may have been purposefully cautious as a way of protecting myself from the distortions a friendship would recreate for me in my role as a researcher. I also believe that I was cautious because she was an elite that I "needed" to complete my research. I could never fully release myself from a sense of guilt that her life was becoming my research. Josseleson (1993) explains that her own guilt as a researcher comes during the shift from the interview process to the writing process. I understand this. Josselson says that the guilt she feels is because of her sense that she is using other people's lives as an exhibit of how clever she is. As I began to craft Ann's life into my written research, a landmark in my own professional life, I find myself humbly preferring to describe our connection as one of respectful relationship over friendship.

Friendship. It is certainly worthy of another mention that Jeff, the mutual friend who introduced us to each other, was tragically killed 18 months before this study concluded. During the days his life was memorialized, Ann and I were in constant communication. I sought to be as good a friend to her as I could possibly be. To this date Ann continues to grieve the loss of a very close friend and I will offer friendship as my support. Jeff's influence connecting our lives to each other is obviously special.

During our last session together Ann and I discussed the nature of our process together and the value of our process to her life. The majority of that conversation will be shared in the next section on "Therapy or Listening." But one point she made in that discussion is fitting to include here. She said, "I feel like I got something better out of our time together than you did." She unapologetically used our process and my time to recreate

the story of her life. In that regard, I have been a very good friend. There is reciprocity, however, because I got my Ph.D.

Therapy or Listening?

During only our second meeting together I asked Ann if her time with me was exhausting. She quickly replied, "No. I actually get very energized by this. I've thoroughly enjoyed it. As a matter of fact, (she's beginning to laugh) I can better understand a little more about what therapy is, which sounds kind of funny, doesn't it?" She continues to explain, "Just being able to talk about and focus on yourself is quite healthy. It's quite enlightening." At the time I was surprised by her admission and uncertain how I felt about her assessment of our process together. It did cross my mind, but only on this occasion, that I felt a bit like a doormat, being used for entry into another place, a place that perhaps I would not be allowed inside. I came to listen. Therapy seemed to imply that I would have some kind of answers. I was not prepared to lead her to any answers. Hatch and Wisniewski (1995) caution researchers about the possibility of invading the privacy of the research participant and "practicing theraphy without a license" (p. 127). And Josselson (1996a) says that in her own research participants told her that the interview "was like therapy, where I say things out loud that I've never said before" (p. 13). Ann resonates with this feeling.

Therapy. Narrative researcher Amia Lieblich (1996) reports that during her qualitative research projects over the years she has become intimately involved in relationships with the people she studies. On more than one occasion she says the

relationship has been compared to therapy. Lieblich points out that the ethical behavior of a therapist requires that he or she maintain strict confidentiality, establish no personal relationship outside the sessions, and only expect payment in return for the help. It is easy to see that these are not the same ethical guidelines for a narrative researcher. As a researcher confidentiality is common, personal contact is open to what is comfortable between the researcher and the participant(s), and the researcher's return on their time is their own research project(s) to be created at their discretion. I believe that there is a distinct difference between real therapy and an experience that feels therapeutic.

Listening. My very first letter to Ann requesting that she consider working with me read in part as follows:

> I'm interested in better understanding the life experiences of individuals in top leadership positions; specifically people that take their own development seriously. I would like to listen to your stories about your own career and personal development over time. I'm interested in hearing about all of you, not just your life at work. I'm not interested in judging or evaluating you, but rather understanding you and your experiences. I believe the benefit to you will be in the reflection on yourself; and I suppose the possible risk is in confronting issues during that reflection that may be difficult or uncertain.

After Ann agreed to work with me, and prior to our first session together, a portion of the letter I sent to her read:

I am interested in learning about your "role" as "self," and the many facets of development and learning in ALL roles. Please be reminded that I will not judge what you have to say as "right" or "wrong."

In these early letters and I believe throughout the research process I maintained a non-judgmental role as a "good listener." Bloom (1998) probes this role specifically, "What, for that matter, constitutes a 'good listener' or 'good researchers'" (p. 19)? Bloom discovers with the respondent in her study that a good listener is someone who provides "focused attention and validation," but probably not good conversation (p. 20). I set up with Ann an environment in which I came to listen. It was not dissimilar to that of a journalist coming to get a story from an informant. Using Bloom's language, Ann became for me a "good respondent" in that she was able to talk easily, narrating her feelings and experiences, and even reflect on these experiences during our time together. I asked Ann to tell me the story of her life, or as other narrative researchers have pointed out, this became tell me the meaning of her life. By-and-large I sat back and listened because I thought this would create the best environment for her to share herself unconditionally.

On more than one occasion Ann said, "It is so good to think about and reflect on my decisions, my life, and my thinking and know that I have such a good listener that doesn't judge what I say." During another session together she said, "I feel very secure in the fact that I've never felt judged. It's very freeing to discover what I think on my own." What Ann is describing are many of the conditions which encourage reflective discourse, a primary vehicle through which transformative learning takes place, and the theme of adult

development and learning as narrative. Ann is telling me that she feels safe. Daloz (2000, p. 114), says that "establishing a climate of safety in which people feel free to speak their truth, where blaming and judging are minimal, where full participation is encouraged" enhances the fullest realization of reflective discourse. I always wanted her to feel safe.

Therapy. A therapist is also good at asking questions. I have for a long time known that the effort taken to compose thoughtful questions in many contexts facilitates learning. So in the interview setting I simply transferred a skill I have always used. Ann noticed. "Your questions are great for thinking. They have helped me move to a new place." During our last meeting and meal together she asked me to share the surprises I have had during this process. The main point I shared with her was the impact of the overall process on her life. The conversation that follows explains better than I her interpretation of what she experienced as it relates to therapy.

> Ann: I know you love to ask questions, but who wouldn't love to go through the process I had the joy of being able to go through?
>
> Pam: Tell me more.
>
> Ann: Think about this. If someone could come and spend a couple hours, or a day, every once in a while, with someone that they like, and just be themselves. And maybe periodically before those meetings have thought-provoking questions to reflect upon. All you have to do is bring yourself to the table, giving you the opportunity to think only about you. . . nobody else.
>
> Ann: You gave me the gift of time together.

Pam: I promised you that when I introduced the idea to you.

Ann: Yes.

Pam: But I didn't know where it was going to go.

Ann: What became research for you, for me was almost therapy.

Ann: The ability to talk to somebody that was not in my realm who did not judge or threaten me, which you have stood by since we first met, is a profoundly freeing thing.

Pam: There is a lot of power in that.

Ann: I didn't ever feel threatened by the questions you asked. Over time, it grows you know, more trust and mutual acceptance. I'd forget about work, I'd forget about everything.

When Ann would bring up the word "therapy" she did so in an apologetic manner. I think she did this because it made her feel like she was using me. I was never comfortable enough to say that I felt the same way about using her story and her life to get something I wanted. Perhaps now we have evened the score.

In this chapter I have told the story of Ann Wagner-Hauser's transition, development, and learning during the years she participated in this research study. I have chosen to provide both a theoretical and a methodological analysis through selected narratives. Thorough as this has been, the chapter is not finished. In the theories of adult development and learning there is emerging and enthusiastic interest in narrative as a theory of adult development and learning. The unplanned developmental story that I experienced with Ann provides an

outstanding case study of this theory. In the final pages of this chapter I will introduce the theory of adult development and learning as narrative, I will review its framework, cite examples of support from Ann's development and my analysis for this theory, and conclude with suggestions for theory improvement.

Narrative as Adult Development Theory

Narrative as a theory of adult development and learning is a philosophy for developing adult lives that is both integrative and compelling. In a review of current adult development typologies, Merriam and Clark (1999) state:

> There has been a shift in the literature of adult development toward thinking about development in a more integrative way; we believe that the most significant and promising work is now being done in this frame. . . . The richness and variety of these approaches impresses us greatly, and we suspect that this approach to adult development will continue and expand and to exert a growing influence on our understanding of the life course. (p. 99)

These authors go on to describe this integration as two-dimensional. They do not use the terms I introduced in the first chapter of this study, but they describe the same phenomenon: holistic and wholistic learning and development. I defined holistic as the multi-faceted, dynamic ways adults learn over time; and I defined wholistic as the synergistic integration of an individual's spirit, mind, and body for learning. Narrative is a holistically and wholistically integrative theory of development and learning as evidenced in this case

study from Ann Wagner-Hauser's life. The narrative story she shared with me over time integrated multiple ways of learning as an adult, and it integrated multiple ways of knowing as an individual. In the first chapter of this study, The Learning is in the Story, and throughout this chapter, I have discussed the qualities of narrative as a way of knowing so that will not be continued here. I will, however, briefly discuss the multiple ways of learning this theory occupies alongside their fundamental nature in adult education. I will then explicate Ann's developmental story within the framework of narrative as a theory for adult development and learning, and conclude with suggestions for theory improvement.

Adult Education Foundations

Over the years, philosophies for adult education, and practices for working with adults, have steadily developed and many are now arguably sound. A few of those foundational theories include androgogy, self directed learning, transformation theories, informal learning, and incidental learning. Adult development as narrative, and adult learning theory as narrative, do not stray from any of these established theories of adult education, but rather create the dynamic integration of multiple theories that Merriam and Clark (1999) called for in the above quote.

Malcom Knowles (1984) defined androgogy as the "art and science of helping adults learn." Pulling together theoretical contributions from Eduard Lindeman (1926), Carl Jung (1969), Carl Rogers (1961), and many others, Knowles pioneered ways of working with adults that continue to be instructive in narrative theory. For instance, Knowles said,

"Adults learn best in informal, comfortable, flexible, nonthreatening settings" (p. 52). The learning environment I established with Ann was all of this: informal in that it was just the two of us at our discretion; comfortable in that we talked about what she was willing to discuss; flexible in that I adapted my interests to the ways she directed the narratives; and nonthreatening in that Ann felt safe and free to explore her own thinking and not be judged.

Self-directed learning theory pioneered by Knowles (1984), Tough (1967, 1971) and Houle (1961) developed a model for adult learning that describes the initiative that adults exhibit in pursuit of their own learning over the life course. Narrative theory also requires initiative and is self-directed. Ann was ready to tell her life story and she was, unbeknownst to me when we began, ready to reflect on her life journey. Ann completely directed the course of our conversations and my research. She might say that I asked the questions, but without her initiative in sharing and exploring her life there would have been no meaningful story.

During the 1990s much interest was rightly given to Mezirow's (1990, 1991, 1994, 1995, 1996, 1998, 2000) transformative learning theory. An abundant introduction and analysis of Mezirow's theory and its application to this case study appears in the narrative analysis of Ann's decision to leave the organization earlier in this chapter. Because the nature of narrative theory includes adults telling, retelling, and re-storying their lives, there is by nature a reflective process similar to Mezirow's transformative learning process. As I discussed in Ann's narrative, and will discuss again in upcoming paragraphs, it is not always possible to assess if the reflective narrative was in fact transformative.

Wiessner and Mezirow (2000) mention additional related theories of adult learning: situated learning, social learning, experiential learning, implicit learning, emotional learning, incidental learning and many others. My point is that it seems that every kind of learning that impacts an adult's life could become part of that adult's narrative and their holistic and wholistic learning. Narrative as a theory of adult development and learning is by its very nature inclusive and integrative of other adult theories. As adults tell their own stories they are constructing their learning as they speak about what is significant to them. The narrative orientation provides an uncharted journey of self discovery into the constantly evolving tapestry of life and learning.

Narrative as Adult Development Theory

The theory of narrative as adult development has been introduced by Marsha Rossiter (1999a, 1999b). I will use Rossiter's theoretical framework to evaluate Ann's developmental story. Rossiter asserts that there are specific qualities in stories that facilitate development. She identifies them as context, interpretation, retrospect, and temporal qualities.

Context. The context of Ann's story is her life with her husband, her professional career, her relationships with her family of origin, and her friendships. The context also includes Ann's history inside each of these relationships and the history of her personal and professional development. The context of a story is also situated in the socio-economic status Ann holds, in her religious, political, and ethnic traditions. When I set out to collect

Ann's life story I was gathering the context of her life so that I could ultimately determine if everything else she shared with me connected to that context and was of authentic value.

Interpretative. The interpretative nature of the story takes into account the values, intentions, and purposes of the teller, or me. Rossiter (1999b) says, "When we read a story, the meaning we make of it is some mix of what is told in the story and what we bring to it from our own store of knowing" (p. 80). By way of interpreting Ann's story I couldn't help but include my own lens of rather negative organizational career experiences as well as my struggles and victories growing up as a woman anxious to make a life for herself. My lens on Ann's life was always seen through the lens of my own life. Therefore, as noted in the narrative analysis, I wanted to tell a story about Ann's departure from her large corporation from my viewpoint. It was difficult for me to divorce my own interpretation from Ann's behavior. In the same way, development for Ann occurs when it is developmental for her, not when I might interpret it to be developmental for me.

Retrospective. The retrospective quality of stories is simply the fact that you can only tell a story of human experience after it has transpired. Only when Ann is in a new developmental place or position will she be able to see where she was. Freeman (1991) posits that development doesn't actually occur until we have arrived at a better place than where we started and can see our own change. Kilgore (2001) evaluates adult learning from a postmodern and critical theorist framework. She points out that issues of knowledge and learning, and power and learning are always at play in adult learning. As it relates to Freeman's contention that development doesn't occur until an individual is in a better place,

I think Kilgore would ask, "But who decides what the better place is?" From Kilgore's perspective it is always advisable to look beneath the presenting situation to determine what individual or group has the most to gain in a given learning situation. A closer review of Freeman's work, reveals that he, too, struggles with what a "better" developmental place looks like and who decides, but he takes the stand that "better" can be ultimately defined by the learner.

Looking back on Ann's developmental story told in these pages, five years have passed. I'm not sure at what point Ann would say she was in a better place. Was it when her sister startled her by saying she'd lost her sense of humor and Ann first began to question herself? Was it when her husband helped her understand that she had choice and control in her life? Was it when she decided to resign? Was it after her party? Or will it be when she's moved through the transitional period she's now in? Or was it each of these events? I would agree with Freeman (1991) that you do not know where you are going in your developmental story until you look back and see from where you have come. I would concur with Kilgore (2001) that questions of knowledge and power are always at hand in determining who is being served.

Temporal. The final quality of narrative development theory that Rossiter (1999b) posits is that it is temporal, in other words, it exists for just a short time and then changes. The story that Ann tells about this journey will never be the same. As she continues to change and grow and experience new learning, her story about these five years will also change and take on new meanings. This is the nature of multiplicity and improvisation

(Bateson, 1990), and nonunitary subjectivities and fragmented lives (Bloom, 1998). Ann's story and my telling will never be just the same; at six months and at six years we will both tell different stories.

Implications for Adult Learning. Rossiter (1999a, pp. 83-84) identifies, from her research, what she sees as the major implications of adult development as narrative theory to adult learning theory. I will support Rossiter's observations with Ann's case study.

1) Rossiter says that learners are always the expert on their own development. Ann was definitely the expert on her own development, and she will continue to be the expert.

2) Rossiter says that narratives are the vehicles that mediate, or create, change. Ann confirmed in our first interview and again throughout our process that it is through talk, that she constructs her thinking and knowing.

3) Rossiter says that the telling of our life stories comes before development occurs. I believe that Ann would tell you that she did not realize what her narratives were leading her toward, it was upon reflection that she can see her ideas changing.

4) Rossiter says that we change, or re-story our lives in the process of transformative learning. In the process of reflection on my questions and our thoughtful discussion Ann was able to re-story her life. She first began by questioning herself, and she may have been unsettled during the process more than I actually realize. This last contribution to adult learning leads nicely to a closer look at my process with Ann and Rossiter's theory.

Considerations for Theory Improvement

The contribution that Marsha Rossiter (1999a, 1999b) has made to adult education through her development of narrative as a theory of development with implications for theories of adult learning are exciting. The qualities of narrative methodology are not new and largely exist outside adult education. However, Rossiter genuinely combines the most advanced scholarship in feminist theory, psychology, child development, life span development, and scholars in education, as well as other disciplines for a new look at understanding adult development. The compelling nature of this theory for me was the combined nature of adult theory with narrative methodology yielding emancipatory results in adult lives. It is of course noteworthy that I did not plan to implement a narrative development research study; this was a surprise. But it was a surprise that affords me the opportunity to offer insight into this theory given my own experience and learning.

Caution for End Goals. I will make brief acknowledgment of four concerns I experienced as a researcher as it relates to implementation of this theory as a practitioner or adult educator. The first concern is of the interpretative nature and has to do with the differences Ann and I drew around why she was leaving the corporation. As I discussed earlier, I wanted to tell a heroic tale of masculine adventure with Ann defeating the corporation. Ann did not tell that story. Her story is one of authentic gratitude and respect for an organization that gave her wonderful life experiences, friendships, and learning. The concern as an adult educator is that we always have goals in mind for the learners we interact with. Our goals and the learners' goals may be different. What influence, or pressure, or

power, might we exert in trying to create a developmental story that matches our own? If I would not have spent time listening to Ann carefully late in our process together I would have crafted a story that was really mine, not hers.

Social and Cultural Influences are Complex. A second observation I have made is the complex nature of cultural and social influences on narrative meaning. It is not possible to construct a story about ourselves, or listen to someone else's story without multiple social and cultural influences about what is right, wrong, on-time, off-time, good, bad, wise, poorly understood, or different. It is not within the scope of this study to continue to investigate all of the cultural and social influences affecting Ann's decisions. However, Ann and I both expected people to be shocked at her resignation and to question her decision-making prowess. And to some degree this happened, however, neither of us expected there to be a huge outpouring of social support, congratulations, and sincere accolades for walking away. This suggests to me that you can never be fully certain how the social and cultural winds on human behavior are blowing. They, too, are always changing. Therefore, caution must be employed by the adult educator that assumes he or she knows the social and cultural ramifications of human behaviors.

Narrative is Complementary. A third observation and experience is that a narrative theory for development can live alongside stage and phase theories of development, as well as transformative theories of development. I am not certain that Ann's developmental story is a story of transformative learning or if it is a passage from one phase or stage of her life on to the next. What I am certain about is that a narrative theory of development provides

insightful and meaningful understandings of developmental change. Through Ann's narrative I was able to "get into her head" in addition to hearing the results of her thinking. Insights into Ann's cognitive and emotional rationale for change provided a complementary, versus competitive theoretical vantage point.

The Story Never Ends. A fourth and final observation I encountered was the ongoing, never ending nature of narrative. The implication as an adult educator is that in our work with learners we can never assume or decide that a learner has "arrived" at some desirable educationally enlightened endpoint. As an educator our role is to continually facilitate a process, as Knowles (1984) so long ago prescribed, that is "informal, comfortable, flexible, and nonthreatening." My process with Ann and our mutual learning has not stopped; it is just done being reported in this format.

Assess the Power Dynamics. Through Ann's developmental story and this narrative analysis I have become intimately familiar with Rossiter's (1999a, 1999b) theory of narrative as development. This research experience has also allowed me to critique her sound work alongside my experience. As an adult educator forever sensitive to the rationale of adult development and learning, I have, since before this study began, been cognizant of the reflective processes utilized in naturalistic inquiry, adult learning generally, and transformative learning specifically. One of the key components within each of these arenas is the reflective process in dialogue. Though there are multiple disciplinary lenses I could use to look more closely at the reflective process, because of my foundation in adult education I will use the theories of Brookfield (1987, 2000) as my guide.

Brookfield (2000) explains that "helping learners become more critically reflective of the assumptions they and others hold is argued by Mezirow to be a cardinal function of adult education and central to a transformational theory of adult learning" (p. 125). He also defines what "critical" reflection means. He says, "In my view reflection is not, by definition, critical" (p. 126). He points out that during the course of a day we each make many decisions, that may even require reflection, but that does not mean that all reflection is critical, or that reflection absent a critical nature is bad. Brookfield's main point is this, and it will set the stage for my critique of Rossiter's theory as I experienced it:

> For something to count as an example of critical learning, critical analysis, or critical reflection, I believe that the persons concerned must engage in some sort of power analysis of the situation or context in which the learning is happening. (p. 126)

He goes on to say that this analysis must also include an analysis of the assumptions underlying the people or things that, because of their power, are eroding a sense of well-being in the adult, and contributing to the good of the person or organization in power. Brookfield would say in the case study I have presented from Ann, that there is a socially constructed workplace culture that had much to do with Ann's life. In the organizational culture, there are issues of power when organizations seduce high level leaders into a corporate story that says, "We need more of you and you will enjoy what we create together." As Kilgore (2001) points out, what group or individual will benefit from this subtle influence of power? In this example, obviously the corporation.

Since this study focused on both the personal and professional lives of the leaders, I would add, then, that there is also a socially constructed culture in Ann's home. In both of these environments there are issues of power. Ann and I did not discuss issues of power in her personal life. However, it seems to me that the issue of power in her relationship with her husband would have also been a factor in her decision to leave her corporate position. Once again adding Kilgore's (2001) perspective, it is wise to examine the learning journey to assess the different voices and what they each have to gain in the learning process and outcomes. In Ann's personal life there would be a power dynamic in her marriage relationship. As Rossiter's theory is currently constructed, there is no purposeful means for exploring the power dynamic in Ann's personal or professional life in the narratives of development and transition.

As I have mentioned earlier, I did not plan to foster a critically reflective transformative learning process with Ann. Therefore, I did not ever consider implementing a more pure examination of Ann's deeply held assumptions that were underlying her decisions. Nor did it cross my mind to assess the power dynamics that I discussed by way of an example above. I am not sure what additional insights I would have gained in so doing, or how that process may have impacted her developmental story and our time together. I can, however, say with confidence that the issue of diagnosing and understanding the power relationships in existence in any developmental story seems to be a worthwhile quality for meaning making in all contexts. As a suggestion to Rossiter and others that study narrative as a theory of adult development and learning I encourage Brookfield's (1987, 2000)

recommendations for review of the role of power dynamics that may impact learning and change.

In this chapter I have introduced a case study of adult development, transition, and learning over a five year time frame with one leader that participated in this study. This exciting story was unplanned, unscripted, and unique. I have described my emotions and shared my interpretations, both theoretical and methodological, of Ann's narratives. I have also shared a bit of myself in the process as well. I have concluded here with observations and considerations for Rossiter's (1999a, 1999b) theory of adult development and learning as narrative. I have specifically pointed out my desire to see an analysis of the power relationships existing in narrative development. My belief is that in methods of research as personal as mine was with Ann, there is power in the influence our lives have on each other, which may lead to changed lives and the possibility for individual and social change in our world.

THE LEARNING IS IN THE WRITING

This research study has been organized into two major sections. In the first section the life stories of three leaders, Ann Wagner-Hauser, Merrill Oster, and Celia Burger were retold. In these life stories I sought to limit my voice and my interpretations of their lives to a much greater degree than in Section Two. In Section Two, two major theoretical and interpretative themes were studied. The first focused on how these leaders sought to balance their lives of leadership. The second focused on the midlife career transition of Ann Wagner-Hauser and was developed as a case study for a theory of narrative as adult development and learning. The method of inquiry in both of these sections has been life history and narrative research. In this closing chapter I seek to reveal a third method of inquiry that has been integral to the entire study. That inquiry method is writing. Laurel Richardson (1994) introduces this inquiry method:

> Although we usually think about writing as a mode of 'telling' about the social world, writing is not just a mopping-up activity at the end of a research project. Writing is also a way of 'knowing'--a method of discovery and analysis. (p. 516)

Other authors agree. In Denzin (1994, citing Carver), he says that "writing is an act of discovery" (p. 504). He explains the adventure saying, "The writer deals with moments of experience. The writer brings all of his or her powers . . . to show how things out there really are and how he (or she) sees those things--like no one else sees them" (p. 504). Denzin likens

Carver's experience as a short story writer to the researcher's task. Denzin states that everything matters, from the commas to the periods; as the writer invests his or her experience with meaning, and "What was unclear before has 'just now become clear'" (p. 504). He affirms that these "understandings emerge in moments of sudden awakening." I understand what Denzin, Carver, and Richardson describe. I have been nearly jolted out of my comfortable key-tapping flow of consciousness to discoveries in my own thinking, by way of writing, that I did not know were within me. I then sit back, startled, and paused, considering for the first time if this writing, this thinking, this meaning-making, could possible be so. More times than not I have illuminated something that was totally dark until that moment.

In the remaining pages of this study I will describe in further detail my experience of writing as a method of inquiry. I will begin by briefly describing my preferences for written over verbal reflection. I will also discuss the trust I have developed in my own narrative form of writing. I will conclude by referencing the particular moments in this study when, through the writing, I was awakened to new learning.

Written over Verbal Reflection

In this study Ann Wagner-Hauser's level of comfort with exploring her own thinking during her time with me became an integral component not only to our process together, but to her learning and transition, and to my understanding of narrative as a theory of adult development and learning. But I do not believe that I could have done what Ann did; I could

not have talked my way through my own learning. In our last meeting together she was telling me once again how much she valued the process of my questions and her having the time to thoughtfully answer. She said to me, "Think about this, who wouldn't love to go through this process that I had the joy of going through?" I laughed out loud and tried to hide my complete discomfort with the thought of sitting on the respondent's side of a series of questions. I didn't want her to feel that she was somehow different in an undesirable way, we just learn differently. I do, however, believe that my preferences for discovery, reflection, and learning are through my writing, versus through dialogue with another person. I find it more difficult to openly explore new thinking out loud. Therefore, over the years I have constructed several vehicles for the expression of my written ideas and to probe my own written reflective processes.

As a graduate student returning to school, after many years in front of a college classroom podium, I needed to figure out a way to connect incredible amounts of new learning with established learning. I rebelled against any practices that looked like formal notetaking. I was a well-studied adult learner and my own experiences had convinced me that unless the new learning connected with my old learning, it usually wasn't useful to me. This, then, would look like me taking running notes to myself during class time as thoughts rolled up in my mind. Often this had little to do with the exact topic being presented, and more to do with how I could implement an idea manifested by new thoughts in my own life. My class notebooks were very personal. They were my journals around learning in my life on a particular topic. They are still deeply personal today and most of the thinking discovered in

that writing still makes sense to me. Schiwy (1996) says the journal-writing experience, of which my classroom notebooks became, is an opportunity to explore feelings, intuitions, perceptions and individual voice. I have for over a decade maintained two journals and I have recorded my personal experiences as a researcher in a dissertation journal.

I share these details to validate that writing has been a method of discovery and exploration for me for some time. I did not, however, expect it to be so obviously powerful in this format. Wolcott (1990) says, "Conventional wisdom is that writing reflects thinking." He sees it differently, saying, "Writing **IS** thinking" (p. 21). I agree with this, and it has caused me to assess the multiple ways I used writing through the entire research experience. Let me explain.

The research experience is often a lonely experience. Given my propensity for writing I used multiple methods of writing for discovery throughout the entire data gathering, recording, and narrative analysis process. Richardson (1994) shares her own well conceived processes which I found to be similar to my own inventions. She creates observation notes, methodological notes, theoretical notes, and personal notes to help her own thinking along the way (p 526). The observation notes occur in the field and record every feeling, thought, and sense experienced. Without exception I recorded field notes after every interview, usually before I returned to my vehicle, and always before I began to drive. Richardson describes methodological notes as suggestions to yourself about what to wear, who to talk to, when to return a phone call. I did this to a limited degree. Because my sample was small, this was easy to manage. If, during the course of an interview I would discover the thought that I

should send this leader a particular book or article to read, I would jot that note to myself and follow-up with the same. This was always very well received by the leaders. For me, theoretical notes took the form of small post-it notes during the writing process. As I would read between other scholars' work, my own writing, and back to the narratives, I would discover linkages that did not exist before. My trail of post-it notes led me from thought to thought like a scavenger hunt. Sometimes I found the prize, sometimes I came away empty-handed. The final note-taking strategy Richardson uses is the idea of personal notes. This seems similar to my own dissertation journal which I have faithfully used for personal thoughts, challenges, and as a way of persevering a long journey. Each of these techniques for writing contribute to my narrative form of writing.

My Narrative Form of Writing

The narrative form my writing takes is likely more obvious to a reader than it is to me. But as writers, it appears even a qualitative researcher hesitates to let their own story out. It is always difficult to know "how to be" in the text. As Bateson (2000) confessed in her text, "Everything in my life goes into what I write in one way or another" (p. 229). I suspect that this has been the case in this research study for me. Clandinin and Connelly (1994) encourage my exposure in the research text. They call my presence "my signature" (p. 424). They describe signature as the writer's experience of having a superficial veil of silence lifted and their voice heard. Clandinin and Connelly also say that this narrative form should be

developed, trusted, and defined; and that I should not hide behind some kind of narrative mask. Given their encouragement, I will describe the narrative form I sought to develop.

My desire has been to share a research text that conveys my warmth toward the leaders in this study, and to readers of this research. I have sought to complement that warmth with a respectful amount of curiosity around these leaders' lives. I would hope that my narrative form has clearly conveyed my relationship with each of the leaders, as well as my respect for them as individuals. My approach with these leaders is reflective of my approach with all adults and my hope is that resonates in the text. As mentioned several times in this study, it is always difficult to tell another's story through your own voice. Krieger (1991) explains her own dilemma of writing herself into the text of others' lives:

> Over time, I have come to feel more caught within myself. I am struck increasingly with the impossibility of getting outside my own skin. The more I grasp someone else's experience, the more I am impressed with how hard it is, how much beyond me that other experience really is. This makes me reluctant to present my views as somebody else's. I think it is important to try to grasp experiences that are not one's own. However, such attempts ought not to be masqueraded as other than what they are: they are attempts, they grasp only small pieces of experience, and they are always impositions of an authorial perspective. (p. 53)

My intention has been to use my narrative form, my voice, in a manner that has clearly identified my voice as my own, and the leaders' voices as their own, as much as that is ever possible. But I recognize, once again, that "I" am scattered all over these pages.

My Discoveries While Writing This Research

Laurel Richardson (1994) says that she was taught not to write until she had something to say. But she is passionate now, that this is completely incorrect. "I write because I want to find something out. I write in order to learn something that I didn't know before I wrote it," says Richardson, (p. 517). And Wolcott (1990) quoting Geertz says, "It is not necessary to know everything in order to understand something" (p. 21). There is much that I did not, and still do not, understand in this research study. But it did not keep me from writing, and in the writing, as Richardson (1994) claims, I discovered even more. Clandinin and Connelly (1994) recommend looking for themes, threads, patterns, and tensions in the individuals' stories, and out of these grow our questions to ourselves in our writing.

The themes, patterns, threads, and tensions in this study were always present; however, with respect to the questions and discoveries that specifically evolved from them **during the writing,** there are three that I want to highlight here. In each of these awakenings, I was literally surprised by the thinking I created. In this experience, I am confirmed than writing is a method of inquiry for the researcher.

The first writing discovery came after years of fieldwork, data analysis, and months of writing. The leaders had been telling me about their experiences with balancing their lives and I couldn't make sense of why other people ever called them balanced. I wrote extensively about the pace of their lives and was even more perplexed. I had discovered the notion of rhythm as a way of thinking about balanced living, but it did not occur to me that there was any fit between that concept and my leaders' experiences in their lives. As I pulled together the multiple themes around commitment and their purposes for living beyond themselves, I saw on the page a very rough acknowledgment in my own writing that these leaders are not balanced; they never wanted to be balanced; they really don't even think about balancing their lives. Most people would say their lives are too fast and filled with too much. But that is not what those who know them well see, they see balance, and so did I, but it was in a different paradigm. It was a way of thinking about balance that was completely different; it wasn't about control of their schedules, it was about learning to live with chaos and complexity and choosing meaningful, purposeful ways to invest their personal and professional lives. This was a new discovery for me through my writing.

The second discovery came when I was trying to describe in Ann's case study, the researcher-researched relationship Ann and I developed over time. I set up the question, is it a relationship, or is it a friendship? I really didn't know what I thought. So I just began to write, thinking back over how we had begun our relationship and who had introduced us to each other. As I put together those occurrences on paper I realized that my relationship with our mutual friend, and Ann's relationship with our mutual friend, had perhaps set up the

expectations we each had for a relationship with each other. Unknowingly we perhaps had each assigned different rules of connection to each other based on our previous experiences. That discovery flowed from my own thinking-through-on-paper of the question I had yet unanswered in my mind.

The final discovery I made through writing inquiry was a substantial connection between theory and experience. Perhaps many others would have drawn this thinking much sooner, but for me it happened again, on the page. During my narrative analysis of Ann's midlife career transition, (Adult Development as Narrative: The Surprise Case Study) I was curious for some time about what she was describing in her narratives. She would ask a lot of questions of herself and her life. She talked about how she wanted the next 20 years to be different than the last 20 years. Yet, she was not dissatisfied with the first 20 years, and her attitude toward the corporation continues to be very positive today. I struggled to understand what she was looking for in life. I'm not certain, but I do question if my own narrative of career success, though this is certainly not what I am living, is deeply embedded in the male master narrative of linear achievement and significant focus on tasks over relationships. Therefore, it was difficult for me to see in Ann that she is actually progressing along the path of female identity development. The questions she has asked of herself, and the decisions she has made, along with her dualistic comfort with both achievement and service, or competence and connection, are reflections of mature female development. This discovery occurred in my writing. In my written analysis of Ann's narratives I was seeing

something that I hadn't seen before. This awakening led me to significant learning and theory development in the remainder of the study.

Writing the End

"Writing for others takes place in the research text," says Clandinin and Connelly (1994, p. 425). But they also go on to point out that the research text is also the place where we write for ourselves, and I acknowledge that there has been much self discovery in the whole of this writing. However, this is not the primary purpose of this writing as Clandinin and Connelly also believe. Ultimately, in this research, there has ideally been new learning for the reader, or the audience, as well. In this larger community of readers, it is my intent that the influence of two things might prevail: First, that the lives of the elites in this study, through their stories, would touch and change the lives of readers. The leaders in this study are in the business of changing lives, so that would be their desire as well. Second, through methods as personal as the ones I have used throughout this study, many human connections have taken shape and been reshaped. Those connections have occurred between myself and the leaders, but there have been connections between the writing and the audience. Through this writing, the fundamental human qualities and personal nature of this kind of research have their greatest potential. That potential, which lives long past this writing, is to encourage personal growth, learning, and change in adult lives as a result of what has for the reader been discovered here.

APPENDIX A

Biographical Sketches

Ann Wagner-Hauser was in her 40s at the time this research study was conducted. She was raised in a two-parent family and was the third of four children. Ann has two older sisters, and a younger brother. Her mother was a college graduate, her father had both his bachelor's and master's degree. While growing up she lived in Minnesota and Colorado. She graduated in the top 15% of her high school graduating class. She was a National Thespian in high school. Ann attended the University of Wisconsin at River Falls for two years and then transferred to the University of San Diego and received a B.A. degree in Business Administration. Her first position out of college was with First Bank in downtown St. Paul. She led a successful career in banking for over 20 years.

Merrill J. Oster was in his 50s at the time this research study was conducted. He was raised in a two-parent family and was the oldest of two children. Merrill has one younger brother. His mother attended the State Teachers' College. While growing up Merrill's grandmother lived with his family for many years. He was raised in northeast Iowa in a rural community. While growing up Merrill was active in high school sports and 4-H. He received a B.S. degree from Iowa State University and a M.S. from the University of Wisconsin at Madison. His first position out of college was in agricultural journalism. He continued his career launching his own businesses which includes Professional Farmers of America, publisher of Futures Magazine, FutureSource and Futures World News. He has always been actively involved in Christian organizations, as well as business organizations. He is an author, speaker, and philanthropist.

Dr. Celia R. Burger was in her 60s at the time this research study was conducted. She was raised in a two-parent family and was an only child while she was growing up. Her family later added two adopted, cherished sisters while Celia was in college. Her mother was a teacher. While growing up Celia and her mother lived with her grandparents while her father was in World War II. She was raised in western Iowa in a rural community. Celia attended Parsons College in southeast Iowa and graduated with a B.A. in English/Speech/Drama. Her first teaching position was as a junior high and high school English, Speech and Drama teacher. She later received her M.A. and Ed.D. from the University of Northern Iowa. Among other things, she has experience in educational administration, Gifted and Talented education, curriculum, leadership and change. She has been involved in education for over 40 years.

APPENDIX B

To: Potential Leader for my Study

I am writing to request your consideration for participation in a research project that several individuals have suggested you would be "perfect" for. The Ph.D. dissertation project is my own. I'm a 'mature' graduate student in Adult Education at Iowa State University but my home is in Waterloo. It's been in conversations here in Waterloo that your name has been suggested to me. Let me tell you a little more about my project.

I'm interested in better understanding the life experiences of individuals in leadership positions; specifically people that take their own development seriously. I'm interested in understanding leaders that commit to learning in all facets of their life--professional, personal, spiritual, and physical--i.e., someone others admire because of the "balanced" life they seek to lead. I'm not interested in judging or evaluating you, but rather understanding you and your experiences.

Before you draw any quick conclusions, let me add a couple more thoughts. Over the last few years as I've shared my potential research study with colleagues, faculty, and friends, I almost always get wide eyes, raised eyebrows, and "that's really interesting, tell me more." I have already piloted this study with a couple leaders, one male and one female. They both would quickly tell you that my research allowed them time for reflection and learning that they deeply enjoyed and valued. And I think they have found me to be pretty easy to work with!

I've learned that a good way to proceed is for the two of us to get together, at your convenience, for a one hour meeting. This will allow us to assess our mutual interest in learning together. I'm hopeful that we might meet as soon as our two schedules allow. I'll plan to contact you in a few days.

I appreciate your willingness to consider this "conversation."

Sincerely,

Pamela K. Edwards

PKE

APPENDIX C

Sample questions asked with leaders:

1. What is the very earliest thing you can remember about your life?
2. Describe it in as much detail as you can.
3. Look back over your life to date. If you saw your life as a series of chapters, what years would belong together in the same chapters? And what would they be titled? What seemed to matter the most to you in each chapter?
4. In what way has "luck," or good fortune, played a role in your life?
5. How much do you feel you have been the architect of your own destiny?
6. Who would be the most influential people in your life? Why?
7. What is your current relationship with your Mom and Dad and your siblings?
8. How are you a product of your family and how are you different?
9. How important have friendships been in your life?
10. How has the experience of friendship changed over the years?
11. Now, how would you describe your college years?
12. What are your major hobbies and interests and how important have they been to you?
13. What is your philosophy in rough times? How do you cope with stress?
14. How have your religious views changed in the last few years? How would you describe your spiritual life?
15. How do you feel now about your choice of occupation?
16. In what ways is your career satisfactory to you? In what ways is your career unsatisfactory?
17. How does your position at work influence how you see yourself as a person?
18. How has your organization encouraged, or discouraged you to be the person you want to be in the whole of your life?
19. As time passes, what do you think about around being a woman/man on this journey through life?
20. What are your political preferences? What shaped them? How active are you in political issues?
21. What does the term "balancing your life" mean to you? What does it look like? Feel like?
22. What are your hopes, dreams, and plans for the future now?
23. Imagine yourself at 80 looking back, what would you be most satisfied to have accomplished or experienced in your life?
24. What accomplishments in your life so far are you most proud?
25. Do you think your story about yourself changes over time?

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~ Walter Elliott

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